



2024 Annual Report



LifeSpan Resources serves the Indiana counties of Clark, Floyd, Harrison, and Scott.

LIFESPAN RESOURCES 2024 HIGHLIGHTS AND ACHIEVEMENTS

Over Fifty Years of Service in southern Indiana!

Voice and Vino at the Casino: Season Seven!

Season Seven of our premier gala fundraiser was held on October 1, 2024, once again at Caesars Southern Indiana to a packed house. Guests were entertained by 6 singing acts, including 3 duets. The event was voted Best Charitable Event by the readers of the News and Tribune. Congratulations to Fancy Fulton-Smith and Keri Duncan, Duet Winners. And, congratulations to Richard Ryan, Individual Winner.

Senior Games

Seniors were transported to France this summer with the 38th Annual Senior Games. This year's theme was Summer in Paris... Oh! La La! The games occurred June 3-7, 2024 and raised over \$48,000! At the closing ceremony, the queen and king were announced:
Queen - Theresa Simmons & King - Jeff Bridges

In Home Services and Aging and Disability Resource Center (ADRC) Highlights:

2024 brought a year of change to our agency as we transitioned from Case Management of Medicaid Waiver clients to Service Coordination under the new state managed care program: Pathways for Aging.

1. Successfully contracted with two managed care entities (MCEs) to continue service coordination for many of our clients under the new Pathways for Aging program.
2. Expanded into 7 additional counties for Pathways Service Coordination: Perry, Crawford, Lawrence, Orange, Washington, Jackson and Monroe
3. Held our 6th annual vendor fair allowing our staff to learn more about the local service providers caring for our clients. Forty service providers participated.
4. Implemented the Aging Brain Care Dementia Care Coach Program to local persons living with dementia and their caregivers.
5. Two management team members received Inform USA Information & Referral Certification

Marketing, Fundraising and Community Outreach Highlights:

1. Held 38th Annual Senior Games – Oh! La La, Summer in Paris Theme –completed our week long event in June with 180 participants and \$48,000 sponsor dollars.
2. Kicked off our new name for the Senior Games Gang, which is now the Senior Games Squad. Added new members to a total of 130.
3. Held Voice and Vino Season 7 – Brought in over \$115,000 and included a new 50/50 raffle and an auctioned guitar signed by Taylor Swift that sold for \$3,000. Also new this year: Three live client testimonials on stage.
4. Expanded annual holiday gift program, the Senior Angel Tree to 100 clients.
5. Developed new planned giving program, LifeSpan Resources Legacy Circle; launched quarterly planned giving newsletter, Partners.
6. LifeSpan Resources once again voted Best In Home Assistance Agency, Best Disability Service Provider and Best Charitable Event (Voice and Vino) by the readers of the News and Tribune.
7. Successfully completed memorabilia scanning project in partnership with the Floyd County library. Nine scrapbooks of historical memorabilia were scanned into the library's Indiana History Room database, thereby preserving priceless pieces of our 50-year history.

HR, IT and Fiscal Department Highlights:

1. Implemented new Payroll System, Paylocity, with electronic timecard capabilities, enhanced compliance, electronic on-boarding, and a host of additional resources that will be explored.
2. Contracted with new HR Vendor, Puzzle HR, to assist with recruitment, strategic planning, employee satisfaction, on-boarding, exit and stay strategies, HR Compliance, Leave and Benefit Management, Labor Law, Job Descriptions, Performance Evaluations, Handbook and Supervisor Manual administration, Employee Coaching and more.
3. Ended the FY24 \$1.9 million in the black with NO audit findings, despite mountainous challenges and banking obstacles.
4. The Rev. Tony Toran, was named the new President of the LifeSpan Resources Board of Directors.
5. CEO of the past 7 years, Lora Clark, announced her retirement in March 2025. Her many accomplishments include eliminating wait lists for direct services, creating the popular Voice and Vino gala, and expanding community awareness of LifeSpan Resources. Lora presided over the most profitable years in our agency's history.
6. Meredith Lambe, named new CEO as of January 2025, becoming our 5th agency leader in our fifty-one year history.

Nutrition and Wellness Highlights:

1. Opened our first new congregate center in over 10 years in an underserved part of our service area: Jefferson Park in Jeffersonville.
2. Expanded the Produce for Better Health Program by delivering 2,082 boxes of fresh produce to 126 congregate clients. Provided 14,574 pounds of produce.
3. Added evidence-based health and wellness programs Stepping On, a falls prevention program; and Bingocize, which offers health education and exercise.
4. Added Dementia Outreach program including Dementia Live hands on workshop.

Transportation Highlights:

1. Contracted with managed care transportation broker, LCP, allowing us to save many clients from having to find alternative medical transportation.
2. Signed contract with Lake Pointe Village allowing us to transport more clients in Scott Co.
3. All drivers completed hands-on training provided by RLS and Associates (RTAP). All passed written and hands on experience tests.



Lora Clark
Outgoing CEO



Meredith A. Lambe
Incoming CEO



Annette Roberts
Outgoing Board President



The Rev. Tony Toran
Incoming Board President

BOARD OF DIRECTORS

Board and Advisory members guiding the work of LifeSpan Resources are elected from throughout our four service counties, ensuring good representation.



Annette Roberts
President - Outgoing
At-Large



The Rev. Tony Toran
Incoming President
At-Large



Tonya Fischer
Vice President
Floyd County



Dr. Deepak Azad
Physician
At-Large



Chris Schwaniger
Treasurer
Harrison County



Melissa Woods
Secretary
Clark County



Barbara Crecelius
At-Large



Jeff Gahan, Mayor
of New Albany, IN
Floyd County



Lynn Reker
Clark County



Doug Drake
Clark County

ADVISORY COUNCIL

Kristin Troyer Ems
President

Beth Preher
Vice President

The Rev. Dr. Albert L. Cole
Secretary

Diane Clark

Joyce Cain

Marti Snyder

Sandra Krekel

State Rep. Ed Clere

Wilma Sadler-Morton

Michelle Cochran

Cheryl Reagan

Samantha Hernandez

PROGRAMS

Fiscal Year 2024 (July 1, 2023 - June 30, 2024)



ADVOCACY AND OUTREACH

We represent senior citizens in many ways in our community through membership in human services organizations and state and national networks. We also sponsor the annual Senior Games (including Nursing Home Games), the Golden Hoosier Volunteer Award, the Senior Angel Tree Holiday Program, and the Senior Games Squad membership program.

Senior Games Participants: 180

Senior Games Squad Members: 130

Angel Tree Boxes Delivered: 100

Lifespan Resources offers this trusted and FREE local resource where people can turn for unbiased information and referral to a wide array of long term support options. Our trained Options Counselors are in person, by phone, or by appointment.

**11,297 interactions were made through the ADRC.
846 interactions with Options Counseling.**

CASE MANAGEMENT/SERVICE COORDINATION

Lifespan Resources serves as the single entry point into a variety of supportive services for older adults and individuals with disabilities to remain independent. Our state certified and highly trained case managers and service coordinators identify needs, link clients with home and community-based services, and create person-centered care plans.

3,456 clients received Case Management for a total of 46,832 hours of service provided.



IN-HOME SERVICES

We coordinate many in-home services that allow our clients to remain living safely in the homes they cherish. These services include:

- Attendant Care
- Home Delivered Meals
- Respite Care
- Adult Day Program
- Home Health Aide
- Transportation
- Home Modifications
- Adaptive Aids and Devices
- Dementia Care Coach
- Other supports to help individuals remain independent in their homes

203,830 units of In-Home services were provided.



LEGAL SERVICES

Lifespan Resources offers legal services to persons age 60 and over through a partnership with a local attorney.

433 hours of Legal Services were provided.

COMMUNITY-BASED CARE TRANSITION PROGRAM

Our Managed Care Options Counselors work closely with the patients' nurse case managers to educate patients and connect them to resources needed for safe transitions from hospital to home.

221 patients received Care Transition services.

LIFESPAN RESOURCES CONGREGATE CENTERS

These centers offer a nutritionally balanced lunch each weekday. Daily programs include health and wellness programs, nutrition education and many fun socialization activities including arts and crafts, cards, games and puzzles, bingo, music and much more. Registration is required (free) and donations accepted. See our website for more information.

Clark County

Yellowwood Terrace
2100 Greentree North
Clarksville, IN 47129

Jefferson Park

2125 E. 10th St.
Jeffersonville, IN 47130

Harrison County

Joe Rhoads Senior Center
123 S. Mulberry Street
Corydon, IN 47122

Floyd County

Mark Elrod Towers
1 Wolfe Trace
New Albany, IN 47150

Scott County

Bacala Senior Center
69 E. Wardell Street
Scottsburg, IN 47170

FAMILY CAREGIVER PROGRAM

This program connects caregivers to community resources particular to their needs including Respite Care, Caregiver Education and other supportive services

10,461 units of service were provided for Family Caregivers.

DEMENTIA FRIENDS / DEMENTIA LIVE!

The Dementia Friends program offers a free one-hour workshop that aims to advance education, reduce the stigma of dementia, and create welcoming environments for those living with dementia.



**DEMENTIA
LIVE!**



NUTRITION PROGRAM – MEALS-TO-GO

LifeSpan Resources Meals to Go! program provides weekly delivery of seven-meal boxes to people who are homebound, who no longer cook, who have no family members to provide groceries, can't afford to buy enough food, live in food deserts, or encounter other barriers. Meals are planned by a registered dietitian to be well balanced and tasty; and provide 1/3 of the daily dietary requirements.

54,055 meals provided through Meals to Go!



PREVENTATIVE HEALTH

Health screenings, nutrition education programs, music, arts and crafts, games and a host of other socialization activities, along with evidence-based wellness programs are offered throughout the year at our congregate centers and other community locations.

**241 health screenings provided.
1,536 units of evidence-based wellness programming provided.
15,232 units of nutrition education and socialization provided.**

VOLUNTEER PROGRAM

At LifeSpan Resources, we welcome and love our volunteers. They help us in many ways year-round including:

- Administrative office tasks
- Medicare counseling
- Congregate meal site servers
- Senior Games scorekeepers and meals servers
- Voice and Vino ambassadors at our annual gala
- Board of Directors and Advisory Council membership
- Angel Tree deliveries
- And more!

144 Volunteers performed 5,607 hours of service

TRANSPORTATION / RIDES-TO-GO

We offer several transportation programs including medical and social transportation and transport to adult day programs. All vehicles are equipped to transport individuals in wheelchairs safely and comfortably. All drivers are background, drug and alcohol tested, CPR and first aid certified, and trained in safe transport.

**5,250 medical trips were provided.
13,533 social trips were provided.
18,783 total trips were provided.**



PRODUCE FOR BETTER HEALTH

This innovative new program offered in partnership with IAAAA, the Anthem Foundation and Indiana University, provides bi-weekly boxes of fresh produce to our congregate clients to take home and enjoy. This is a "Food as Medicine" program that researches the health effects of consuming more fresh produce.

**126 clients served.
2,082 boxes of fresh produce provided.
14,574 pounds of produce provided.**

CONGREGATE NUTRITION

Our local congregate nutrition centers offer a daily hot lunch, socialization activities and games, evidence-based wellness programs, and nutrition education.

24,641 congregate meals provided.

VOICE and VINO season 7

LIFESPAN RESOURCES

ANNUAL
GALA



October 1, 2024

Voice and Vino 2024 Sponsors

TITLE

Caesars Southern Indiana

GOLD

MAC Construction | Black Diamond Pest Control | Unruh Foundation

SILVER

The Marketing Company | The New Washington State Bank | Wells Fargo Advisors
Underproduction Multi-Media | Timmel Associates | Pediatric Plus | Fox Law Offices, LLC

FRIENDS OF

Duke Energy | Ruth Heideman | DMLO | Trilogy Heath Services | First Harrison Bank
Hellenic Senior Living | L&D Mail Masters | New Albany Housing Authority
Stoll Keenon Ogden PLLC | Hosparus Health

WINERIES



For more information and photos, visit lsl14.org/voice-vino/



LifeSpan Resources' 38th Annual Senior Games June-3-7, 2024

Last year's theme, "*Summer in Paris - Oh! La La!*" celebrated the Summer Olympics and all things French.

We were able to enjoy some new facilities this year and celebrated the Summer Olympics in style all week long.



Senior Games 2024 Sponsors

PLATINUM

Masterson's Catering

DIAMOND

Afton Home Care, Kaiser Home Support Services, Timmel Associates, LLC, QSource

GOLD

Brightwell Behavioral Health, Hellenic Senior Living, Home Instead, American Senior Communities, 1st Americare, George's Pharmacy, Insurance Workshop, Aetna, Elder Advisers, Newcomer Funeral Home, Trilogy Health Services, Ed, Clere State Representative, VNA Health at Home, Communicare, Ohio Valley Home Health, Help at Home, CenterWell, The Medicare Man

SILVER

German American Bank, Humana, VRI + Guardian Medical Monitoring, Caesars Southern Indiana, Naville & Seabrook Funeral Home, Mathes Pharmacy, Westminster Village, Bridgepointe Gardens, Home Helpers, Charlestown Place at New Albany

IN KIND

Floyd County Family YMCA, City of New Albany, City of Charlestown, NARFE - New Albany, Eastern Heights Baptist Church, Kroger - Charlestown Road, Best Signs, Strike and Spare Family Fun Center, Pilot Club

JOIN THE "SQUAD"

The Senior Games "Gang" became "The Squad" in 2024

The Senior Games Squad is LifeSpan Resources membership program for area adults age 55+. The program offers an outlet for socialization and friendship development, plus health and wellness activities. Members receive free registration in the upcoming Senior Games and monthly "Members-Only" events throughout the year.

For more information, contact Melissa Richardson, Director of Development, at 812-206-7960.



FINANCIALS

FISCAL YEAR 2024

(July 1, 2023 – June 30, 2024)

OUR MISSION

Promoting Independent Living for
People of All Ages

OUR VISION

"LifeSpan Resources will be the key organization in Southern Indiana supporting independence and quality of life for all persons through advocacy, education and client-centered services."

INCOME

Contract/Program Income	\$9,822,737	86.10%
Grant Income	\$396,697	3.48%
Donations	\$116,787	1.02%
In-Kind Income	\$396,908	3.48%
Fundraising Income	\$190,040	1.67%
Miscellaneous Income	\$485,533	4.26%
TOTAL	\$11,408,703	100%

Expenditures

• Information & Referral	\$69,180
• Transportation	\$778,695
• Medicaid Transportation	\$340,067
• Case Management	\$286,932
• Options Counseling	\$322,351
• In-Home Services	\$949,352
• Medicaid Waiver	\$2,726,606
• Waiver Intake/PASSR	\$501,065
• Legal Services	\$41,905
• Health Screenings/Education	\$21,268
• Ombudsman	\$51,319
• Congregate Meals	\$719,189
• Meals To Go	\$1,075,648
• Administration	\$250,158
• Fundraising	\$80,268
• Family Caregiver	\$332,841
• Senior Health Ins Assist Program	\$7,673
• Anthem	\$6,960
• Dem Care Coach/Health & Wellness	\$85,900
• Produce for Better Health	\$67,898
• Other	\$801,293
TOTAL	\$9,516,569

Balance Sheet

ASSETS

Cash and Grant Receivable	\$10,210,869
Medicaid Receivable	\$26,922
Other Assets	\$1,035,001
Fixed Assets	\$519,581

TOTAL ASSETS **\$11,792,373**

LIABILITIES

Accounts Payable	\$191,879
Payroll Withholdings	\$9,366
Accrued Expenses	\$311,570

TOTAL LIABILITIES **\$512,815**

NET ASSETS

Temporarily Restricted	\$57,749
Unrestricted	\$11,171,331
Unrestricted Assets	\$50,477

TOTAL NET ASSETS **\$11,279,558**
TOTAL LIABILITIES & NET ASSETS **\$11,792,373**

GRANT FUNDING RECEIVED — *Thank You!*

Anthem/IAAAA Foundation Produce for Better Health Grant - \$82,591

Funding from this grant provides fresh produce monthly to Nutrition clients while tracking their ongoing health outcomes.

Caesars Foundation of Floyd County - \$12,000

Funds support matching grants for our *Rides to Go!* Transportation program.

Federal Transit Administration Enhanced Mobility of Seniors and Individuals with Disabilities/TARC - \$171,520

Funds provided to purchase new Ford Transit wheelchair-accessible vehicles for our *Rides to Go!* Transportation program.

Glick Foundation Grant - \$5,000

Provides funds for our *Rides to Go!* Transportation program.

Samtec Cares - \$12,000

Funds support matching grants for our *Rides to Go!* Transportation program.

New Albany Community Development Block Grant - \$5,000

Funds support our *Rides to Go!* Transportation program.



GLICK
PHILANTHROPIES
*Building Community.
Creating Opportunity.*



ORGANIZATIONAL DONORS

Abernathy Construction
 Accessicare
 Actor's Theater of Louisville
 Alpha Mechanical Service
 America's Charities
 American Senior Communities
 Atlas Technical Consultants
 Autumn Woods
 Bearno's Pizza
 Benton & Associates
 Benton Fine Jewelry
 Best Signs
 Best Vineyard
 Black Diamond Pest Control
 Blackiston Bowl
 Bridgepointe Gardens
 Brightwell Behavioral Health
 Brown Forman
 Bubba's 33
 Caesars Foundation of Floyd County
 Caesars Southern Indiana
 Captain's Quarters Riverside Grille
 Carefirst Rehab
 Careforth
 Cattleman's Roadhouse
 CC Medi Spa
 Champion Waterproofing & Piering
 Charles de Castro Memorial Fund
 Charlestown Place at New Albany
 City of Charlestown
 City of New Albany
 Classic Furniture
 Clear Voice Solutions
 CLLB Law
 Culbertson Home for Old Ladies
 CureTech Innovative Therapies
 Cybertek
 Dailey Wellness, Massage and Yoga
 Dan Cristiani Excavating & Paving
 Dance Louisville
 Derby City Bop Club Members
 Derby Dinner Playhouse
 Designer Fragrances and Gifts
 Dew Drops CBD
 Dirt Works Excavating
 Dr. Black's Eye Associates
 Dragon King's Daughter
 Duke Energy
 Dunn Orthodontics
 Eastern Heights Baptist Church
 Elder Advisers
 Ethel Harris Tutoring
 First Harrison Bank
 FL Putnam Investment Mgmt. Co.
 Floyd County Brewing Company
 Floyd County Parks and Recreation

Floyd County YMCA
 Foundation Risk Partners
 Four Lane Road Media
 Fox Law Offices
 Freedom Care
 Garr Funeral Home
 Gary & Ruth Gilmore Foundation
 George's Pharmacy
 German American Bank
 Glasstek Glazing Inc.
 Graphic Packaging
 Greentree Real Estate
 Harland Clarke
 Harrison County Community Foundation
 Hellenic Senior Living
 Help at Home
 Hoke's Auto & Truck Repair
 Home Instead
 Huber Winery
 Humana
 Hunter's Ridge Winery
 Images Aloft Ballooning
 IU Southeast/Ogle Center
 Ivy Tech - Sellersburg
 Jacobi Sales
 Jacobi, Toombs and Lanz, Inc.
 James & Cheryl Whelan Fund
 Kaiser Home Support Services
 Kaiser Wholesale Inc.
 Kendra Scott Philanthropy
 Kentucky Science Center
 Kenwood Party Store
 Knights of Columbus
 Koreman LLC
 Kroger - Charlestown Road
 L&D Mail Masters
 Legacy Pizza
 Libs Paving
 Los Monitos Language Center
 Louisville Slugger Museum
 Louisville Zoo
 MAC Construction
 Magna Engineers
 Mark's Feed Store
 Masterson's Food & Drink
 Mathes Pharmacy
 McAllister's Deli
 MedMart
 Mesa Collaborative Kitchen
 Mom's Meals
 Nance's Florist
 NARFE New Albany
 Naville & Seabrooke Funeral Homes
 Network for Good
 New Progressive Baptist Church
 Newcomer Funeral Home

Nugent Sand
 Ogle Center Volunteers
 Ohio Valley Home Health
 Old 502 Winery
 Oliver Agency Insurance
 PACE Contracting
 Peacock Valley Nursery and Farms
 Pediatric Plus Home Healthcare
 PepsiCo Foundation
 Pints & Union
 Prime AE
 ProMedia Group
 Raymond Johns Co.
 RecBar 812
 Rivercrest
 Ronaldo Jewelry
 Sacred Heart Catholic Church
 Samtec Cares
 Schimpff's Confectionary
 SCHS Class of 1965
 Senior Games Gang
 She Said Productions
 SkyDive Kentucky
 St. Augustine Church
 St. Croix Hospice
 Stacey's Childcare
 Starlight Distillery
 State Representative Ed Clere
 Stay at Home Care
 Superior Van and Mobility
 Sweet Stuff Bakery
 Temple and Temple
 Terri Lynn's Café
 The Elderberry Company
 The Exchange
 The Insurance Workshop
 The Marketing Company
 The Mansion on Main
 The Medicare Man
 The PepsiCo Foundation
 Timmel & Associates
 Travis Albertson - Elvis Tribute Artist
 Trilogy Health Services
 Underproduction Multi-Media
 United Way
 Upland Brewing
 V Media Group
 Visting Angels
 Vocational Rehabilitation
 VRI + Guardian Medical Monitoring
 Westminster Village
 Wooded View Golf Course
 Woodford Reserve

Individual Donors listed on our website at: lsr14.org/donors/

Disclaimer: Every effort has been made to list all donors. If your name is not listed, please contact Melissa Richardson, Director of Development, at 812-206-7960.



JOIN OUR LEGACY CIRCLE!

Legacy Circle members are any donors who make a commitment for a planned gift to our agency. You are considered our “Partners in Promoting Independent Living.” As part of our LifeSpan Resources Legacy Circle, you join the top tier of our most valued supporters. You will receive our quarterly newsletter, “Partners,” which is full of great advice for making a lasting impact with gifts that help our clients and offer you tax and financial benefits. You will also receive invitations to special estate, financial and retirement planning workshops, members-only events, and opportunities to personally help our clients.

There are many easy ways to make your planned gift!

At LifeSpan Resources, we welcome the opportunity to work with you and your advisors to evaluate your charitable giving strategy. The list below contains easy giving options, each with certain tax benefits. Find more information about each on our website.

Together we can begin the process, determine what works best for you, choose the concepts that will help you realize your objectives, and put your planned gift in place.

We greatly appreciate your consideration of making a planned gift to support our current and future clients who need our assistance to remain independent.

- **Charitable Bequest**
- **Gift of Stock • IRA Gift**
- **Gift of Retirement Account Assets**
- **Gift of Charitable Remainder Trust**
- **Gift of Real Estate**
- **Gift of Life Insurance**

Remember: Meals on Wheels, transportation, and in-home help can be that priceless gift to make an individual’s last years comfortable, peaceful, and pleasant. It’s what we ALL would want!! Contact Lucy Koesters, Chief Business Development Officer, for a personal consultation at lkoesters@lsr14.org or call 812-206-7938.

Patty Cress (right), has won more Senior Games medals than any other participant. The Games mean so much to her that she decided to join our new Legacy Circle as a planned gift donor. Thank you Patty!





A member of the  connect Alliance.

(812) 948-8330

33 State St, New Albany, IN 47150

lslr14.org