



LifeSpan




*Strengthening families and
individuals who seek to improve
the quality of their lives.*



Dear friends of LifeSpan:

As we begin a new year, we all share the hope that the economic anxiety, housing crisis and political uncertainty of the past year are behind us. Gas prices, grocery store receipts and foreclosure notices have been among the visible signs of these trying times. Less tangible but equally significant have been the consequences these stresses have had on the health, safety and well-being of our community.

It seems to be human nature that when times are stressful and the future looks uncertain we turn to sources that bring us strength and stability. Often that's our families, friends or organizations we trust. LifeSpan has proudly served as a steady force in this community during this past unsteady year just as it has for the 64 years since its founding in 1945. During the fiscal year 2007-2008, LifeSpan assisted 8,200 individuals and families in Butler and Warren Counties. Our programs continue to grow to serve the ever changing needs of our community and, in the past fiscal year, we've used the tools of technology to make our work more efficient, environmentally conscious and more client focused than ever before. In the pages ahead, I'd like to tell you about a few of the ways we've served more clients, become more efficient and added programs as we continually strive to "link families with solutions."

A photograph of a woman with long dark hair, wearing a brown jacket, smiling warmly. She is standing behind two young boys. The boy on the left is wearing a grey t-shirt and has his arm around the woman's shoulder. The boy on the right is wearing a blue and white shirt. They are outdoors with trees and foliage in the background.

"Many people have a natural tendency to help others in need. When they understand the significant results that an agency like LifeSpan has on so many lives, they quickly understand the impact of their participation. It is also important for people to understand that "participation" does not necessarily mean that they can only help by making a financial contribution. Rather, their time and talents can also be valuable."

— Joe Scholler,
LifeSpan Board Chair 2008-2009

Families in financial crisis turn to LifeSpan

As our country's economic plight took center stage in the past year, LifeSpan's Consumer Credit Counseling Services (CCCS) not only remained a steady force to assist families in financial crisis, but we also expanded our services, accessibility and use of technology. The program served 1,489 Butler and Warren County residents in fiscal year 2007-08, an increase of more than 200 clients from the year before. The credit

and housing crises have led more families to seek services while a new grant has funded an expansion in Middletown.

While LifeSpan has long offered nationally accredited CCCS, the past year brought an increasing diversity of clients as people from all walks of life sought help with debt management, foreclosure prevention and bankruptcy counseling. The increase in clients led the program to add another credit counselor, increase the hours the Middletown office is open, and expand the use of technology to save time and paper while better serving clients. In the past year, the program has gone paperless by scanning documents into electronic files that are more secure and efficient than the previous paper files. Technology also provides the opportunity for clients to take online finan-

cial literacy classes as well as fulfill the federal requirements of bankruptcy counseling.

In the past year, CCCS partnered with People Working Cooperatively (PWC) in a foreclosure prevention program funded by a grant from the Federal Home Loan Bank. With grant funds, PWC is providing repairs and accessibility improvements for Middletown homeowners who have a person with disabilities in residence. LifeSpan is providing in-home money management education to these homeowners to increase their financial literacy and reduce the likelihood of future foreclosure.

More calls and more clients in ESP

Nationwide our population continues to age and Butler County is no exception. The county's Elderly Services Program (ESP), administered by the Council on Aging of Southwestern Ohio, saw continued growth as older adults sought out services they need to remain safe and independent in their own homes. In 2007-08, LifeSpan remained the single point of entry for ESP in Butler County. Professional, compassionate staff members answer the Intake & Screening (I&S) phone line, handling more than 7,100 calls in the past year. These staff

members were well prepared to handle the heavy call volume; in addition to their training and years of experience, this past year they achieved specialized certification from the National Alliance of Information and Referral Systems.

During the past year, care managers saw an increase in clients, serving 133 more people in 2007-08 than the previous year. Care managers screen potential clients, recommend services, then coordinate and monitor those services for homebound seniors. During 2007-08, LifeSpan care managers served clients in the cities of Fairfield and West Chester and Fairfield and Liberty townships. That changed January 1, when LifeSpan assumed responsibility for ESP care management in all areas of Butler County. The Council on Aging (COA) decided

last summer that it is in the best interest of clients countywide to have one ESP care management provider. COA considered many factors in awarding sole responsibility to LifeSpan including our history of offering care management services over the past 34 years, our ability to smoothly handle significant caseload growth in recent years, and our position as the only ESP care management program to be accredited by the Council on Accreditation.

"Seven years ago I had 26 credit cards. Two of them had a balance of more than I made in a year's time. I 'graduated' after five years in the LifeSpan Credit Counseling program and on my son's 16th birthday I bought a three-bedroom house with a two-car garage."

*– Lynn,
Credit Counseling Client*



An increased reliance on technology has helped to support the growth in clients. In the past year, all care managers were provided laptop computers with wireless cards which provide access to the main ESP database from the field. Care managers were able to cut their documentation time in half by entering information online instead of using paper forms and that, in turn, gave them more time to spend problem solving and connecting clients with community resources.

Safety net gets bigger

The passage of the Butler County Mental Health Levy in late 2006 had an immediate impact on LifeSpan's Guardianship program in 2007. With this new source of urgently needed funding, more mentally ill and disabled adults were able to access services and more referrals



were made to the Guardianship program. The program began in Butler County in 1996 with one part-time guardian and three wards, adults who could not competently make their own decisions. In 2007, five staff guardians and two clerical staff served 232 wards in Butler and Warren Counties. These staff members, along with committed volunteer guardians, form a safety net to protect and advocate for some of the most vulnerable members of our community.

Increasing awareness of the program continues to bring referrals from nursing homes, medical facilities, the court system, and community agencies. Providing all staff guardians with laptop computers has enhanced the program's efficiency. This use of technology increased the amount of time guardians can spend with their wards as their reliance on paper documents and faxes lessened. As guardians are on 24-hour call, the laptop computers provide immediate access to wards' records if an emergency arises.

Social workers help more students

Stress within families typically trickles down to children who often manifest it in their behavior at school. In the past year, five Butler County schools relied on LifeSpan social workers to support at-risk students. The school based social workers interact daily with students and staff in a holistic approach to solve problems, provide links to outside services, and offer the support needed to keep students on track and in school. During the 2007-08 school year, the social workers served 125 more students than the previous year with the addition of Greentree Health Science Academy. The school requested a LifeSpan social worker to help students work through racial divisions and the social worker's efforts were so successful, that despite a tight budget, the school has funded the position for the current academic year as well.

Two of the school based social workers are also trained mental health therapists. They offer on-site counseling to students with mental health issues. This service keeps the students in school instead of having to leave during school hours to access outside therapy.

"I can be more than just an 18 year old mom still going to school and having all kinds of trouble. I can make something of myself; I can be something and go somewhere. The social workers really helped me a lot and I appreciate it."

—Jessica, Student in School Based Social Work Program

Looking to the future

With community needs driving program growth, LifeSpan will continue to seek new sources of funding, new ways to use technology to increase efficiency and enhance client service, and new collaborations with other community organizations to further broaden its impact. The added ESP responsibility that began with the start of this year has already brought hundreds of new clients into the care management program. LifeSpan's Web site is undergoing an upgrade and by spring should have a new look as well as more user friendly features.

None of our efforts would be possible without the consistent support of our friends and donors. Whether you give financial support, time as a volunteer, or talent as a committee member or event organizer, we value every contribution and thank you for sustaining our work. It is through your commitment that we are all able to meet our mission statement "strengthening individuals and families who seek to improve the quality of their lives."

Sincerely,

Cynthia Stever, Ph.D.

Chief Executive Officer

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LifeSpan Recognizes Those Who Support Our Mission

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\$25,000.00 or more

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Remembering Irma Sandage

In October LifeSpan marked a sad occasion with the passing of Irma Sandage. Irma was a great champion of LifeSpan, serving as the executive director from 1971 to 1986. During Irma's directorship LifeSpan experienced large scale growth setting the agency on firm ground to face the future. We are deeply saddened by her passing and tremendously honored that she remembered LifeSpan in her will. To leave a memorial in Irma's honor please contact LifeSpan at 868-3210.

Financial Report

	Amount	Percentage
Revenue		
Contributions & Special Events	\$367,487	11%
United Way	\$251,725	8%
Government Grants	\$1,248,946	37%
Govt. Fee for Service	\$1,095,083	33%
Client Fees & Insurance	\$380,636	11%
Other Income	\$4,201	0%
Investment Income	\$(4,939)	-0%
Total	\$3,343,139	

Expenses by Program

Counseling	\$744,287	22%
School-based Social Work	\$244,648	7%
CCS	\$229,351	7%
Guardianship/Payee	\$362,622	11%
Homemaker/Personal Care	\$647,245	19%
I&A/Case Mgt.	\$491,434	14%
Independent Living/ Family Advocacy	\$160,782	5%
Admin & Mgt.	\$428,536	13%
Development	\$91,823	3%
Total	\$3,400,728	

Expenses

Direct Service	\$2,880,369
General and Administrative	428,536
Development	91,823
TOTAL	\$3,400,728

Statement of Financial Position

July 1, 2007 – June 30, 2008

	2008	2007
Assets		
Current Assets		
Cash - operating	\$ 118,832	\$ 137,764
- restricted	365,765	157,513
Investments, at fair value	497,866	354,461
Accounts receivable - United Way	172,725	170,450
- Fees and grants	233,917	290,430
Current portion of promises to give, less allowance for uncollectible pledges of \$2,550 for 2008 and \$3,546 for 2007	27,901	9,903
Prepaid expenses	23,462	26,770
Total current assets	1,431,468	1,147,291
Property and equipment, net	1,887,503	1,996,526
Other assets		
Workers' Compensation deposit	1,000	1,000
Long-term pledges receivable	1,427	30,873
	2,427	31,873
Total Assets	\$ 3,321,398	\$ 3,175,690
Liabilities and Net Assets		
Current liabilities		
Line of credit	\$ 25,000	\$ 141,795
Current portion of mortgage payable	14,772	60,000
Accounts payable	35,375	15,398
Accrued wages and payroll taxes	87,807	81,843
Accrued retirement	62,505	43,985
Advances - contracts and grants	161,851	42,822
Deposits - restricted	356,765	157,513
Total current liabilities	744,075	543,356
Long-term Liabilities		
Mortgage payable	512,228	509,650
Net assets		
Unrestricted	1,683,089	1,784,752
Temporarily restricted	382,006	337,932
	2,065,095	2,122,684
Total Liabilities and Net Assets	\$ 3,321,398	\$ 3,175,690



LifeSpan ...we link families with solutions.

Join us as a volunteer and you, too, can be a link – strengthening our community and making it a healthier, better place for everyone.

Your time and talents as a volunteer can benefit LifeSpan in many areas. We have opportunities for those who enjoy a variety of office projects, serving on event committees as well as specific program needs. For instance, our Guardianship program has a great need for volunteers to serve clients by maintaining their safety and living environments. Volunteers receive training as well as ongoing support and assistance from LifeSpan staff. Please call us at 868-3210 to discuss volunteer opportunities.

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LifeSpan: Strengthening families and individuals who seek to improve the quality of their lives.

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