



Florida Association of
Aging Services Providers

Florida Association of Aging Services Providers e-Newsletter

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Guest Editors: John Clark, Council on Aging of West Florida, Inc.
Anita Ingersoll, Washington County Council on Aging, Inc.

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BY:



Washington County Council on Aging

Elder Services of Okaloosa County
Okaloosa County Council on Aging

Message from the President

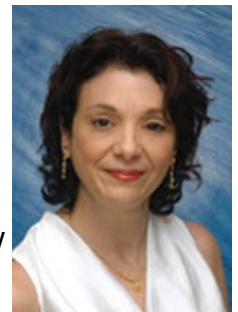
by Andrea Busada, Broward County Elderly and Veterans Services

Dear FASP Members:

Your Board of Directors kicked off 2016 with a meeting in Tallahassee accompanied by visits to Legislators' offices and Florida Senior Day at the Capitol. Visiting Legislators is an impactful strategy, especially when there is opportunity to visit district offices. I encourage each of you to express to your Legislators why home and community based services are so valuable in your community by stopping by their offices.

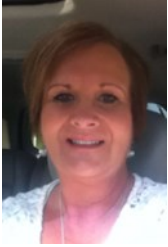
The House and Senate budgets continue to propose increases in funding between \$2 and \$3 million for Community Care for the Elderly and \$1.7 to \$2.3 million for

Alzheimer's Respite Care. We are hopeful that the increases will continue to the final budget, and will continue to monitor activity at the Capitol to keep you apprised. Now more than ever, it is important to nurture relationships with our Legislators throughout the year in order to build upon that work when the Session begins. We are proud of FASP members' efforts in the Advocacy Initiative!



Sincerely,
Andrea Busada

HELP!! I Need Somebody



Have you ever been caught in a situation of caring for your loved one and feel that you have absolutely nowhere to turn?

Being in the workforce of caring for the elderly I never realized the impact it has on someone until recently. I have an 86 year old mother who was diagnosed with Parkinson/Dementia. I never realized the impact this would have on me being the caregiver for her. I was trying to hold down a full time job while helping her to maintain her independence as much as she could, for as long as she could. Overwhelmed is an understatement of how I felt. Anxiety over her every move throughout the day and night led to countless nights of no sleep and questioning whether or not to take advances in my own career. Where do I turn I would ask. Not realizing, at that point, the answer was right before me. Our own Adult Day Center was my answer to making sure that she would be taken care of. I could continue my job with the peace of mind knowing that she was being taken care of. It was a huge help to me and proved to be beneficial to my mother. It gave her the chance to interact with others and even meet an old friend from school. It was amazing to see the glow in both of their eyes as they were able to reminisce about their school days. Keeping her active physically and socially through the activities at the center has had a great impact on her. Having her use her mental skills as well as her motor skills have made an improvement in her as well as relieving some of my stress.

I know there are several others just like me who are faced with the same situation. It seems all too common that caregivers struggle with the task of how to balance their work while sustaining quality of life for their loved ones. Add in the factor of being in a rural community and it is easy to cry out Help! I need somebody.



It is difficult in the rural area to find services and programs that can help individuals dealing with these types of difficulties. Washington County Council on Aging is blessed to be able to have a grant that allows an Adult Day Center.

A service that is much needed in our community. Seniors with Dementia and Alzheimer's, along with caregivers, can benefit from this program. We offer this for in-home and at our facility. Our staff is ready and available to meet your loved ones needs.



In-home seniors benefit from individualized care in the comfort of their own home. Seniors at our facility enjoy daily activities, exercise, socialization and continuous interaction. Keeping them active and motivated at any level, whether at our facility or in their home, makes a positive impact on your loved one as well as you.



Anita Ingersoll, Executive Director

Washington County Council on Aging, Inc.

Making Life Easier for Seniors Since 1973



Real Possibilities

Wait No More

By Jeff Johnson, State Director, AARP Florida

For years, advocates for older Floridians and their families have watched waiting lists for home- and community-based services grow as state budgets put other priorities ahead of supporting caregivers.

Three years ago, Florida had more than 54,000 frail, older state residents on waiting lists for services that help family caregivers keep their loved ones where nearly all of us want to remain as we get older – living independently in our homes and communities.

Legislators put additional dollars into state budgets in 2014, and again in 2015, and again in 2016. Yet each year, waiting lists have grown. As of late February 2016, the waiting list has grown to more than 60,000 people.

Even worse, in February the nationally recognized news outlet Politico showed that more than 6,500 Floridians, most of them frail elders, died while on the waiting list for all types of home- and community-based services.

These services include Community Care for the Elderly, Home Care for the Elderly and other major programs. Working together, aging-service agencies throughout Florida use these services to provide support that family caregivers rely on to keep their loved ones living independently in their own homes and communities, rather than in an institutional setting.

Some 2.8 million family caregivers call Florida home, and their commitment and dedication help keep many frail, vulnerable Floridians from requiring care in institutional settings, often with help from public programs. When Florida caregivers get the support they need, it's a win both for families and for taxpayers.

AARP Florida is grateful for the financial support that the state of Florida has given in order to reduce these waitlists and serve more Floridians in need.

Yet Florida is falling further behind in its support for family caregivers. Each registrant represents a family and a caregiver who bears responsibility for helping their frail loved one remain where they want to stay – at home and in the love of their community.

In the 2016 elections, AARP Florida will be pressing candidates for the Florida Legislature to tell voters where they stand on this important issue. AARP Florida will reach out to aging-service allies across the state to enlist support for family caregivers.

Caregivers have waited long enough for the support they have earned. They should wait no more.

Through appearances at candidate forums and town halls, online advocacy, editorial board visits, letters to the editor and op-eds and more, AARP Florida will press for the Legislature to commit to significantly shrinking the Home and Community-Based Services waiting list.

Our long-term goal for the Wait No More initiative: To shrink the waiting list for home- and community-based services by at least 20 percent every year while also creating a system that will foster a brighter future for disabled and elderly Floridians.

To succeed, the Wait No More initiative needs your help. Please reach out to legislative candidates in your area and ask them to commit to shrinking the waiting list for home- and community-based services. Also, please watch www.aarp.org/fl for more information and opportunities to engage in this important initiative.

The Retreat: A Senior Day Experience by John Clark

Imagine a special place where you can get a change of scenery, socialize with friends, enjoy activities, take walks in the shade and enjoy fresh air in a secure, protective environment. Imagine that same special place providing peace of mind and personal time for yourself. What would you call it?

With input from caregivers, staff and Council on Aging of West Florida's business development committee, we renamed our adult day care center to better reflect how its participants and their caregivers feel about it – The Retreat.

The Retreat is a special place, and experience, that has been described as refreshing, supportive, fun, assuring, caring and heartwarming by those who participate and their families. It is a place that provides a positive change of environment that can be beneficial to participants as well as caregivers.

So why The Retreat? Other words and phrases used by caregivers to describe what their family members experience when they attend included social interaction, companionship, entertainment, joyful, safe and a happy environment. Words and phrases provided by caregivers to describe what the center means to them included peace of mind, assurance, relief and time off. One caregiver summed it up in a recent thank you card to the staff, which simply said, "Thanks so much for all you do in caring for my mother. I can rest assured knowing she is in great care."



Each day at The Retreat is a special experience consisting of outside walks, exercise class, arts and crafts, table and card games, mental stimulation, special parties and celebrations. The Retreat also



offers regularly scheduled field trips to picnic areas, parks, museums, historical places, area attractions, bowling alleys and movie theatres. These well-supervised trips are not only fun, but trigger memories and promote socialization.

In fact, for participants with higher cognitive and physical functioning who can follow directions, have good endurance and are capable of attending events with limited supervision, there's Day on the Go. It is an exciting off-site experience in which schedules are planned to allow for a day full of activity and extended respite for caregivers.

The Retreat is a licensed adult day care center (AHCA license # 9051), and financial support for participation is possible in several ways: The VA provides funding for many veterans who qualify; state general revenue funding and federal funding is also available for eligible participants; managed care companies provide payment for some of their members; private pay options are available at rates much lower than those charged for in home care; and a limited number of "scholarships" provided by local groups and churches are also available.

Our Retreat is another cost effective option in the continuum of care for elders and their caregivers with a proven track record of positive outcomes. Participants have plenty of physical, mental and social stimulation and other positive outcomes include happier moods, a greater sense of purpose in life, better sleep habits, greater independence and increased motivation. Caregivers are provided critical respite which means they can become a better caregiver and are helped to continue caring for their loved ones 24/7. Everyone is a winner, the participants, the caregiver, the community and the taxpayer.

Florida Senior Day



Karin Diaz and Angela Vazquez shown with Secretary Verghese

The FASP Board convened January 26th before attending the Florida Senior Day Reception, Florida Senior Day and visiting Legislators at the Capitol.

Florida Senior Day included a well-attended Town Hall Meeting, complimentary lunches and group tours.



FASP Member Ruth Lovejoy Featured in Local News



At 90 years of age, FASP Member Ruth Lovejoy remains active in making a difference in the lives of elders in her community. To see the full feature, including the television clip, click [here](#).



Ruth Lovejoy

Advocacy

The Florida Council on Aging continues advocacy to increase funding to General Revenue Funded home and community based programs: Community Care for the Elderly, Home Care for the Elderly, Alzheimer's Disease Initiative/Respite Programs and Local Services Programs. FCOA is requesting significant increases to reduce the waiting lists for services for Florida's most frail older adults. This year we are requesting an increase of **\$35.9 million to serve 5,954 people on the waiting list.**

FCOA, FASP and advocates all over the state have been attending Delegation Meetings and getting out and sharing information about aging services programs with Legislators and their staff.

How can YOU help?

1. Invite a Legislator or their staff to deliver meals, visit a senior center or adult day center. They will see for themselves how important these programs are to the lives of older adults and their caregivers.
2. Make a donation to help FCOA to support grassroots advocacy work. Your donation will help cover expenses associated with the FCOA advocacy work. [CLICK HERE to make your tax-deductible donation.](#)

Coping with Hearing Loss Isolation



Hearing loss can be a challenge when one goes from an active social life to isolation. As humans, we crave for the social connection with our friends and loved ones. Without it, the feeling of loneliness sets in, affecting our overall health wellbeing of mental and emotional, lacking the social stimuli and the required serotonin to maintain happiness. It is a combination of social isolation, emotional turmoil and insecurity from the frequent attempts in trying to understand conversations.

According to Florida's Coordinating Council for the Deaf & Hard of Hearing's 2011 report to the Governor, Florida is home to more than 3 million people with a hearing loss. Usually long distance phone calls are the norm for families to stay in touch. Floridians with hearing loss can receive a free amplified telephone made possible with the passage of Florida's Telecommunication Access System Act of 1991, establishing Florida Telecommunications Relay, Inc. or FTRI as the state's non-profit equipment distributor. The current 12 cents surcharge, imposed on all landline services, pays for the phones distributed at no charge to qualified Florida residents.

The equipment available through the program includes:

- Telephones that amplify incoming sound
- Signaling devices that alert you when the phone rings
- Captioned telephone and more

To qualify for an amplified telephone applicants must be a permanent Florida resident, age 3 years or older, have a certified hearing loss or speech difficulty and home landline service.

FTRI contracts with 25 non-profit Regional Distribution Centers (RDCs) statewide to serve clients in the community. To locate the nearest RDC, go to www.ftri.org/locations and conduct a zip code search. THE RDCs are available for outreach and phone distributions. Should you wish to schedule an outreach event and/or phone distribution, please contact your local RDC. Applications can be requested from the www.ftri.org/free website.

Please start a conversation today with your consumers and staying in touch with loved ones near and afar. Addressing hearing loss issues can help provide the following benefits that include:

- Better relationships with families
- Higher self-esteem
- Improved mental health
- Greater independence and security

Florida is speaking up for better communication and staying connected! Thank you for your continued support of the FTRI program.

FASP Members may reprint this article in its entirety without prior permission from the author.

Assisted Living in Okaloosa County: Turning a Vision Into a Reality by Ruth Lovejoy

There was a time in our society when aging relatives were "taken in" and cared for by extended families. The grandmother, grandfather or aging aunt provided additional nurturing for the emerging generation. They all made time to listen, to talk, to love and share lore, legend, family history and bits of wisdom. Sad to say, today we are often missing that special time to talk and listen to these stories. But, those days were not always idyllic; they were often a time and life of labor and hard work.

With the boom of the Industrial Revolution, the migration of peoples in our country and the changes wrought by the automobile, family life and dynamics gradually changed. No longer did grandparents, aunts, uncles, cousins, and other relatives live next door, in the neighborhood or in the same city or state, necessitating the creation of what were called "poor houses," "old folks homes," or "rest homes."

It would be many years before the more modern concept of elderly care would evolve with some homes, motels, and assorted structures being retrofitted for the frail elder. In larger, more urban cities, creative planners would sometimes convert and/or remodel closed schools and hotels for senior living.

In the late 70's and early 80's Okaloosa County citizens had few choices in senior living options. When there were choices, they were often cost prohibitive for the average senior. Indeed, assisted living was just coming into vogue during that time period. It quickly became apparent that there would be a need for affordable, quality assisted living that would be affordable for Okaloosa seniors and their families.

It is said that everything happens for a reason. So it was during this time period that Okaloosa County voted to get out of the hospital business and sold the certificate of need for the 3 hospitals to Humana and HCA Columbia. Recognizing the gap in affordable assisted living care in the area, the Okaloosa County Council on Aging and, in a giant leap of faith, approached the Board of County Commissioners to lease the "old" Twin Cities Hospital building to the Council on Aging for \$1.00 a year. The vision was to turn this facility into an affordable quality assisted living facility for area residents.

Former State Representative Jerry Melvin obtained a state grant of \$350,000.00 to replace the roof and install a fire sprinkler system. Without any local tax dollars to support the effort, the community became involved in a unique effort that made a safe and welcoming home for the frailest amongst us. Local groups, organizations, churches, and individuals were asked to help refurbish and furnish the facility. Volunteer inmates from the Eglin Federal Prison Camp, state prisoners, and Okaloosa County prisoners scrubbed, cleaned and repaired. The State Fire Marshal guided us in bringing the facility up to code. So many people, so many groups, so many churches, all too numerous to mention, made a vision a reality.

The following year, while staff and volunteers were basking in the wonder of so many doing so much that before we could catch our breaths, Margaret Gebauer, the President of the agency's Board of Directors determined that Northern Okaloosa County should have the same accommodations. Thus, converting a former county building in Crestview into an assisted living facility was on our planning board. Once again, without local tax dollars, but spurred on with a vision of what could be, a similar group of volunteers provided the labor and materials to refurbish and transform the building into a safe and pleasant home for 65 residents.

Twin Cities Pavilion and Crestview Manor are monuments to ordinary people joining together to accomplish extraordinary results; proving that you can turn a vision into a reality even without money. I like to say that our assisted living facilities are "serving those who worked as hard as they could, ran as fast as they could but never caught that golden ring."

Please visit our website at <http://elder-services.org/> to learn more about these two unique facilities.

Nonprofit Lobbying

Andrea Newman of James Moore, CPAs: www.jmco.com

This is the second article in a nine-part series on the Form 990. Read our first two articles: [Nonprofit Compliance Checklist](#), and [How to Reivew the Form 990](#).

Nonprofit organizations face multiple challenges: shrinking of grant funding alongside decreases in contributions. The demand for services continues to increase, but nonprofits face increased government oversight and minimal resources to expand services. Nonprofits, now more than ever, must become involved in public policy debates to raise awareness to the issues facing their local communities. If nonprofits are not engaging with politicians and raising awareness to the critical issues within their communities, it's likely that no one else is either.

However, many nonprofits do not know what lobbying activities they can or cannot participate in and how much money can be spent on lobbying. IRS regulations detail the permissible lobbying activities for the various 501(c) organizations and lay out the expenditure restrictions. These activities must also be recorded in their Form 990. Any 501(c) organization who answers "yes" to IRS Form 990 Part IV question 3 (political campaign activities), 4 (lobbying activities), or 5 (membership dues or assessments) has to complete Schedule C to furnish additional information on political campaign activities or lobbying activities.

What are political expenditures?

Political expenditures consist of any direct or indirect expenditure made for political campaign activities, including a payment, distribution, loan, advance, deposit, or gift of money or anything of value. They also include contracts, promises, or agreements to make an expenditure, whether or not legally enforceable.

What are lobbying expenditures?

Lobbying expenditures consist of the amounts paid or incurred for the purpose of attempting to influence legislation through communication with any member or employee of a legislative or similar body, or with any government official or employee who may participate in the formulation of the legislation, or by attempting to affect the opinions of the general public.

Types of lobbying expenditures:

Nonprofits incur **direct lobbying expenditures** in their attempts to influence any legislation through communication with a member or employee of a legislative or similar body or other government official or employee, where the principal purpose of the communication is to influence legislation.

- Communication is considered direct lobbying only if it refers to specific legislation (i.e. has already been introduced to a legislative body) **and** reflects a view on such legislation.
- A communication is **not** a direct lobbying communication if it is concerning action by the legislative body that might affect the organization's existence or tax exempt status as opposed to merely affecting the scope of the organization's activities.

Examples of direct lobbying communications are sending letters or publications to, meeting with, or calling legislators or government officials regarding specific legislation.

Nonprofits incur **grassroots lobbying expenditures** in their attempts to influence any legislation through an attempt to affect the opinions of the general public.

- Communication is considered grassroots lobbying if it refers to specific legislation (i.e. has already been introduced to a legislative body), reflects a view on that legislation, **and** encourages recipients to take action about the specific legislation (e.g. encouraging individuals to contact legislators; including legislator contact information; providing a petition or tear-off material to send to legislator; direct mail; placing advertisements; issuing press releases; holding news conferences or rallies).

Engaging in nonpartisan analysis, study, or research and making results available to the public or government officials is generally **not** considered lobbying.

Lobbying versus Activism

A specific activity is only considered direct or grassroots lobbying if it includes all elements of the definition included above. Let's say a director for a 501(c)3 organization schedules a meeting with a member of Congress to discuss the challenges low-income individuals face when trying to find affordable housing in their community. As long as there is no pending legislation on this issue and the director doesn't propose any legislation to address this issue, then the meeting was not considered direct lobbying. If a 501(c)3 organization paid for advertisement in a newspaper or magazine, or sent a direct mailing praising a proposed bill but did not include one of the four

Continued from Page 8

calls to action we mentioned earlier, that would not be considered lobbying.

Lobbying Expenditure Rules for 501(c)(3) Organizations

Exemption as a section 501(c)(3) entity precludes an organization from devoting a substantial part of its efforts to influencing legislation (i.e. lobbying). Because the meaning of the term *substantial* is unclear, an entity may not know when it crosses the line between insubstantial and substantial. To minimize uncertainty and to allow certain entities the opportunity to do a limited amount of lobbying, Congress enacted specific lobbying guidelines allowing an eligible organization to elect to use IRC Sec. 501(h). Eligible organizations (educational institutions, hospital and medical research organizations, organizations supporting a public college or university, publicly supported charities, and organizations supporting a public charity) that make this election can spend a specified amount to influence legislation without risking the organization's tax exemption.

NOTE: this election only applies to lobbying expenditures; all political expenditures (i.e. expenditures for political campaign activities) are prohibited.

An organization can make a 501(h) election by filing a completed [Form 5768](#) with the IRS.

Under the 501(h) election, nonprofits are subject to the expenditure test, in which an organization is permitted **total** annual lobbying expenditures (grassroots lobbying plus direct lobbying) equal to—

- 20% of the first \$500,000 of the organization's exempt purpose expenditures, plus
- 15% of the next \$500,000, plus
- 10% of the next \$500,000, plus
- 5% of any remaining expenditures

Up to \$1 million max for any organization regardless of exempt purpose expenditures

A **separate** limitation is imposed on grassroots lobbying expenditures, which is equal to 25% of the limitation for total lobbying expenditures (up to \$250,000 max).

501(c)(4)(5)(6) Organizations

501(c)(4)(5)or(6) may lobby without limitation and participate in some partisan political activities because contributions to these organizations are not tax deductible.

Any 501(c)(4)(5)or(6) organization that receives membership dues must complete Part III of Schedule C of the Form 990, regardless of the extent of political campaign and lobbying activities. A notable exception to the definition of lobbying activities for these organizations is that **only** for purposes of Schedule C Part III reporting, direct lobbying expenditures do **not** include local legislation (i.e. only state and federal lobbying are reportable as nondeductible on this schedule).

Another exception unique to 501(c)(4)(5)or(6) organizations is the in-house lobbying exception. An organization may mark "yes" on Schedule C Part III-A line 2 if the organization had \$2,000 or less of in-house lobbying expenditures **and** no other lobbying expenditures. In-house lobbying expenditures include salaries and other expenses of the organization's officials and staff paid for the planning of legislative activities. If the organization had any other lobbying expenditures that are not considered in-house (i.e. direct contact of legislators or general public to influence legislation), and/or any political campaign expenditures, then the organization does not meet this exception and answers "no".

Conclusion

Nonprofits can, and should get involved in the legislative process and participate in policy discussions to make sure their voice is heard. They must also understand how to lobby appropriately and not put their nonprofit status at-risk as a result of these activities. Nonprofits must ensure their Form 990 includes all lobbying expenditures and activities. They should also consider filing the completed Form 5768 to the IRS. James Moore, CPAs is experienced in preparing these forms and is a good resource to nonprofits who want to make sure their documentation is prepared thoroughly and accurately. [Contact us](#) for more information on lobbying and preparing your Form 990.

This article was reprinted with the written permission of James Moore, CPAs.

Resources

AARP Random Acts of Kindness for Caregivers Contest (ends March 16) [Click Here.](#)

Who Will Care for the Caregiver? [Click Here.](#)



James Moore and Co Webinar Recording: Make Planning Pain Free & Productive for Your Nonprofit - [Click Here.](#)

FASP Board Member Honored

Congratulations!

Long-time advocate and FASP member, John Clark, was recently honored by InWeekly Best of Coast as the runner-up for Best Boss. His staff was quoted saying “We were thrilled to snag Runner Up, Best Nonprofit at the Independent News’ 19! Congrats to our President/CEO, John Clark, who also won Runner Up. Best Boss. He’s not a runner up to us though...He’s OUR best boss!”



March 3-7, 2016: Long Beach, CA. Association of Gerontology in Higher Education Conference. [More information.](#)

March 20-24, 2016: Washington, DC. American Society on Aging - Aging in America Conference. [More information.](#)

May 19-20, 2016: Long Beach, CA. American Geriatrics Society Annual Meeting. [More information.](#)

FASP is on Facebook - Are You?



Do you or does your organization have a Facebook or Twitter account?
We would love to “like” “Friend” and/or “follow” you too.

FASP - Florida Association of Aging Services Providers Facebook page

<http://www.facebook.com/home.php?#!/pages/FASP-Florida-Association-of-Aging-Services-Providers/186392068069967>

FASP - Florida Association of Aging Services Providers Twitter

<http://twitter.com/1FASP>

follow us on
twitter

DOEA - Florida Department of Elder Affairs Facebook page

<http://www.facebook.com/pages/Florida-Department-of-Elder-Affairs/128604923878650?sk=wall>

FCOA - Florida Council on Aging Facebook page

<http://www.facebook.com/home.php?#!/pages/Florida-Council-on-Aging/74320166787>

FCOA - Florida Council on Aging Twitter

<http://twitter.com/#!/FCOA1>



Real Possibilities

<http://www.aarp.org>



Council on Aging
of St. Lucie, Inc.

<http://www.coasl.com>



<http://www.hillsboroughcounty.org/>



<http://www.bmbinc.com>



<http://www.volencenter.com>



www.newvisioneyecenter.com



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<http://www.coawfla.org/>



Washington County Council on Aging

<http://www.washcocoa.com/>

Elder Services of Okaloosa County

Okaloosa County Council on Aging

<http://elder-services.org/>

The intent of the FASP Newsletter is to keep you informed about program updates and information relating to aging services providers. If you have any comments about the newsletter, suggestions on ways to improve it and/or items you would like included, please contact FASP by e-mail at moreinfo@fasp.net or by phone at (850) 222-3524.

FASP's Mission: Supporting older adults and the providers that serve them through information, connection, and resources.

Mark your Calendars and Save the Date for the
2016 FLORIDA CONFERENCE ON AGING!

AUGUST 8-10, 2016
The Caribe Royale, Orlando, Florida

[Register Online](#)
[Register to Exhibit Here](#)

