

Proposal to the Carl B. & Florence E. King Foundation
From Jewish Family Service

The Agency

Founded in 1950, Jewish Family Service's (JFS) mission is to preserve and strengthen the quality of life for individuals and families in the Jewish and Greater Dallas communities by providing essential and affordable mental-health and social services. Rooted in the Jewish values of caring, individual dignity, and social justice, Jewish Family Service's goal is to provide confidential and life-changing help to anyone in need. We focus our efforts on families, in all their varied forms (individuals, couples, children, single parents, elderly), as one's primary source of love, support and learning. JFS services are dedicated to assisting individuals in navigating through life's normal transitions and unexpected crises, which may impact individuals' emotional health and ability to sustain self-sufficiency. Served without discrimination, clients generally reside in the North Dallas area and represent all walks of life.

One of only six Dallas-Fort Worth agencies accredited by the Council on Accreditation for Services to Children and Families, JFS continually meets the highest standards of practice in areas including governance, fiscal management, human resources management, and quality improvement. We are dedicated to the evaluation of our programs and pleased that service outcomes affirm our effectiveness in making a significant difference in the lives of our clients. Because of the generosity of our donors and funders, services are provided on a sliding scale (or at no charge to the recipient) and for as long as is needed.

JFS is unique in offering a full continuum of programming to better serve our clients. Individuals may present with a stated need like emergency financial assistance, but will leave having had access to employment services, mental health counseling, support groups, food pantry and more. Major programs of Jewish Family Service include:

- Serving over 250 annually, our counseling programs assist children, adults and families in managing their emotions and behavior in order to function effectively;
- Reaching more than 800 annually, our employment programs assist individuals in securing and retaining employment in order to better support themselves and their family;
- Serving almost 700 annually, our gerontology programs assist the frail elderly in safely maintaining independence in their own homes;
- Reaching 160 individuals annually, our family violence programming helps clients achieve physical and psychological safety, and emotional well-being; and
- Over 2,000 annually receive emergency assistance case management, in order to maintain self-sufficiency, in the form of food, cash or medication.

With 24 years experience in social work and nonprofit administration, executive director Michael Fleisher holds a Master of Science in Social Administration and is a member of the Academy of Certified Social Workers. Joining the agency in 1993, he provides leadership to a staff of 23 full-time and 13 part-time employees. JFS has been blessed with a dedicated, capable and professional staff whose tenure well-exceeds the average turnover rates within the nonprofit sector. Our expert staff includes Licensed Clinical Social Workers, Licensed Marriage & Family Therapists and Licensed Professional Counselors.

Comprising 39 business, civic and social service leaders, Jewish Family Service's Board of Directors provides strategic leadership focused on agency effectiveness, financial stability and

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policy-making. In addition to providing financial support, each Director participates in a standing committee, including Program Services and Resource Development. Meeting on a monthly basis, the Board ensures integrity, efficiency and accountability in the delivery of our life-changing services.

More than 1,000 community volunteers lend their time and expertise to JFS on an annual basis. Whether providing clerical support, serving as meals-on-wheels drivers or leading the agency at the Board level, volunteers are at the heart of our work - sharing their time, knowledge and financial resources in order to help others. Annually, these dedicated supporters donate over 13,000 hours – representing a cost-savings of approximately \$220,000 to the agency.

The Need

The growth of America's elderly population affects many aspects of society - challenging policymakers, families, businesses, and health care providers to meet the needs of the aging. *Older Americans 2004: Key Indicators of Well-Being*, a comprehensive analysis compiled by 12 federal agencies, cites several indicators – including marital status, diet, active lifestyle, and financial means – that can predict future struggles for the aging elderly. Of particular concern to the Federal Interagency Forum on Aging-Related Statistics is that “large, out-of-pocket expenditures for health care have been shown to encumber access to care, affect health status and quality of life, and leave insufficient resources for other necessities.” The following statistics illustrate the breadth and challenges our aging population faces:

- 12% of the population is over 65 (representing 51,000 elderly in the 7-mile radius surrounding Jewish Family Service);
- 10% of the elderly live in poverty (more than 5,000 in JFS's immediate area);
- 17% of Dallas residents 65 and older live alone;
- the average prescription costs for older Americans was \$1,340 in 2000; the average number of annual prescriptions has risen from 18 to 30 since 1992;
- 20% of adults over 85 show clinically-relevant depressive symptoms;
- a healthy diet can play a major role in preventing or delaying the onset of chronic diseases (including coronary heart disease, cancer, stroke, type 2 diabetes); and
- the majority of the population over age 60 in Texas reports having at least one broadly defined health condition that can interfere with independent living.

United Way of Metropolitan Dallas' 2005 Needs Assessment on Seniors cites several worsening trends related to the access and availability of programs to address the needs of senior citizens. With the aging of the Baby Boom generation, the number of persons age 60 and over is rapidly increasing, placing an enormous burden on the state programs and nonprofit organizations responsible for elder care. Although the aging elderly desire to live independently, the following factors may impede their goals, including: living in poverty or on a fixed income; overloaded geriatric health system; vulnerability to crime; lack of qualified caregivers; cost of prescription drugs; gaps in government funding; and mental illness. As stated in prior Needs Assessments, the need continues to dramatically increase while access to services has decreased.

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The Program

With over 55 years experience offering gerontology services, Jewish Family Service is well-suited to serve the needs of ageing individuals in North Texas. Through prompt, efficient and comprehensive services, our objective is that frail elderly individuals will maintain their independence in their own homes for as long as they desire and can do so safely.

Before contacting Jewish Family Service for assistance, most clients have had one or more obstacles to independent living, including a fall or medical diagnosis, trouble with memory, loss of driving ability or the death of a spouse. Service begins when a licensed staff gerontologist meets with a client, usually at their home, to discuss what the client sees as their unmet need. Together, they will create a care management package, selecting from the programs below, to address their issues. JFS's gerontology staff stresses the values of self-determination, respect for the individual and their sense of dignity. We focus on an individual's strengths and resources – always mindful of the client's goal of independence. JFS's Gerontology program consists of several distinct, yet complimentary programs geared toward maintaining self-sufficiency:

- Assessment – an evaluation of the client's needs and capabilities that affect daily living (i.e. ability to feed themselves, take medications, maintain a clean environment, etc.)
- Recommendations – referrals for assistance are made, as appropriate
- Care Management – coordinating and monitoring of services, including individually tailored care-management packages to address the client's specific need (i.e. implementing and monitoring medical, referrals to social services, recreational activities in coordination with family and friends, etc.)
- Emotional Support – individual and confidential counseling with a licensed, clinical professional at the client's home
- Lifeline Emergency Response Service – telephone and personal help button which immediately links clients to professional intervention and/or emergency services 24 hours a day
- Kosher Home-Delivered Meals – volunteer meal delivery thrice weekly
- Medi-Transportation – door-to-door transportation to medical appointments
- Personal Resource Organizers – volunteers help with paperwork and money management
- Homemaker Service – support is given to assist with light housekeeping
- Friendly Visitor – volunteers visit house-bound clients for companionship

Fundamental to JFS programming is our emphasis on providing comprehensive services to the whole person and their family. Our qualified staff is trained in assessing all the issues that may impact a client's functioning, including living arrangements, health, relationships, personal resources, and emotional/cognitive status. The diverse continuum of services at Jewish Family Service enables us to refer clients to other agency services (i.e. counseling, emergency assistance, job placement, food pantry) – thus comprehensively addressing barriers to self-sufficiency. In-house access to this range of services enables us to work efficiently (no waiting lists) – passing on easier access and more control to the client.

JFS's gerontology programming is unique in that in-home clinical counseling services are available to any elderly client served by the agency. Several sister organizations provide in-home care management, but JFS is the only organization employing a team of clinical social

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workers in service delivery. As the highest licensure authorized by the State of Texas, Licensed Clinical Social Workers (LCSW) are uniquely qualified to provide comprehensive, in-depth counseling for as long as is needed.

Most organizations provide bundled gerontology services that are time-limited and concentrate on “supportive counseling” and resource identification. In addition to the LCSW licensure, JFS staff are certified Independent Medicare Providers who do not need a doctor’s order to provide psychotherapy services. JFS staff have the time and expertise to identify and address issues like depression, anxiety, grief, and loss. Once a client has enhanced his/her emotional coping skills, they are better able to maintain independent living.

Due to the nature of this request to the King Foundation, we would like to further expand on the medi-transportation component referenced above. JFS has offered transportation since the mid-1980s as a compliment to services enabling the elderly to remain independent. In Dallas and surrounding areas, only limited transportation options are available for frail elderly citizens who can no longer drive. Hiring private transportation is too costly for the large number of low-income, isolated and elderly (the average age of an individual in our gerontology program is 88 years) clients in Dallas County, including those we serve.

Our experience has shown transportation to be a significant barrier to service. Without this JFS program, clients would miss important doctor’s visits, thus severely undermining their ability to remain independent. In 2005, we served 60 individuals with transportation for 600 trips. Administered by Bessie Fobbs, who has worked for JFS for more than 20 years, clients are transported by a trusted and reliable friend. Unlike cab or DART service, Ms. Fobbs will help clients into the doctor’s office and provide additional personal assistance when needed. As with other Jewish Family Service programming, transportation is provided on a sliding scale (from \$0 to \$10 one-way) based upon client need.

The Clients

The following table reflects the demographics of the individuals who have been served by Jewish Family Service’s Gerontology program in the last year. In 2005, more than 680 frail elderly were served, representing a 16% increase since 2003.

Location	85% Dallas County; 13% Collin County; 2% Other
Gender	79% female; 21% male
Ethnicity	5% African American; 93% Caucasian; 1% Hispanic; 1% unknown
Religion	50% Jewish; 37% non-Jewish; 13% unknown
Age	7% between 25 and 64; 57% between 65 and 89; 33% over age 90; 3% unknown

The Results

Jewish Family Service’s ongoing quality improvement process includes service outcomes, as well as client and community surveys for Gerontology participants. Program evaluation goals and targets are below:

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TARGET	2004-2005
Objective 1 Target: 90% of frail elderly will remain independent for 90 days following initiation of or re-contracting of service.	93.5% met target
Objective 2 Target: 85% of frail elderly will remain independent for 6 months following initiation of or re-contracting of service.	88.7% met target
Objective 3 Target: 80% of frail elderly will remain independent for 12 months following initiation of or re-contracting of service.	80.1% met target

The Funding

On behalf of Jewish Family Service’s Board of Directors, we respectfully request a grant of \$55,000 for our continuum of gerontology services, including the acquisition of a wheelchair accessible van to support transportation services for the elderly and infirm.

Of our \$55,000 request to the King Foundation, \$25,000 would be applied to our continuum of gerontology services listed on pages three and four of this application. With a program budget of \$787,000, other funders solicited to support these services include: [names and amounts omitted].

A donated, 4-door Mazda sedan is currently the mainstay of our medi-transportation service. This vehicle’s age (16 years) and mileage (103,000 miles) will soon render it unreliable and cost-prohibitive to maintain. Of equal concern is our current inability to transport wheelchair-bound individuals. With these issues in mind, Jewish Family Service has identified a Dodge Entervan minivan (through Dallas Dodge) and conversion package (through Wright-Way) that would enable us to serve both ambulatory and wheelchair-bound clients. This new vehicle will include: 10” lowered floor with remote power door; power folding ramp; power kneel system; and quick release seating for passenger seat. This vehicle can accommodate up to five passengers, including two wheelchairs, thus greatly expanding our ability to serve the growing needs of our elderly clients.

Of our \$55,000 request to the King Foundation, \$30,000 would be applied to the purchase of a wheelchair accessible minivan referenced above. The total expense (including vehicle, TTL and conversion) is approximately \$50,000. Other committed funds include \$18,000 in restricted, grassroots support and another anticipated \$2,000 gift from [name and amount omitted]. The remaining funds needed are \$30,000. This proposal to the Carl B. & Florence E. King Foundation represents our only pending request for the remainder of funding.

With a budget of \$2,352,000, Jewish Family Service will continue to engage the community by requesting grassroots support, hosting fundraising events, submitting foundation proposals and exploring new and innovative revenue streams. A grant from Carl B. & Florence E. King Foundation will surely be an endorsement of JFS’s Gerontology Program and may help to leverage future community support.