



Southern Maine
AGENCY
On **AGING**

SERVING OUR COMMUNITIES FOR 50 YEARS



Annual Community Report

Fiscal Year 2022

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Together We Do

After two years of social distancing and working, living, socializing, and celebrating from afar, we were finally ready to be together again. 2022 was a turning point for all of us at the Southern Maine Agency on Aging - staff, volunteers, partners, and donors - to regroup and rediscover the energizing power of doing things side by side, together.

The programs we organized, the events we held, and the services we provided in 2022 gave a boost to all that was coming in 2023, our 50th Anniversary!

We accomplished a lot, with the support of our partner organizations, our generous donors, and the communities we serve:

- AARP TaxAide Foundation and SMAA volunteers supported more than 200 older adults in filing taxes to receive their \$850 Maine Relief Check and Property Tax Fairness Credits. The returns are estimated to be over \$150,000.
- We held the first multilingual Tai Chi classes for New Mainers through our partnerships with Catholic Charities Maine Refugee and Immigration Services and the New England Arab American Association.
- To improve resource and information sharing among non-profits, businesses, volunteer organizations and community members working on behalf of older adults, we launched The Exchange: Southern Maine Alliance for Older Adults. We've had over 250 attendees total in our initial networking groups.
- Maine's RespiteforME grant and the Caregiver Respite Program allowed us to better meet the increasing needs of local caregivers.
- We would not have been able to deliver over 250,000 meals to homebound older adults in our communities, provide Medicare counseling, or offer Wellness programs without the 400+ volunteers who devoted their time and expertise to our clients.

We are proud of the impact Southern Maine Agency on Aging has on the communities across southern Maine because we did it together. We are even more excited about what lies ahead. As we celebrate our 50th anniversary in 2023, we will continue to grow and be the organization that older adults, adults with disabilities and their caregivers can count on for the next 50 years.

We express our sincerest gratitude to the individuals, foundations, municipalities, corporations and State and Federal partners who make this work possible. Thank you for your support and your partnership.

Sincerely yours,

Megan Walton
CEO

Susan Keiler
Board President

William Hall
Advisory Council Chair

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Our impact is measured by more than the data we report. And what really stands out are the client stories; the long-lasting relationships with other organizations working on behalf of the older adults in our communities; the heartfelt support from our donors, volunteers, and sponsors; and the above-and-beyond dedication of our staff. We believe that the only way to have a meaningful impact is when we work together.

Stronger Together

Remembering Vivien A. Pitman: Nurse and Advocate for Exceptional Care

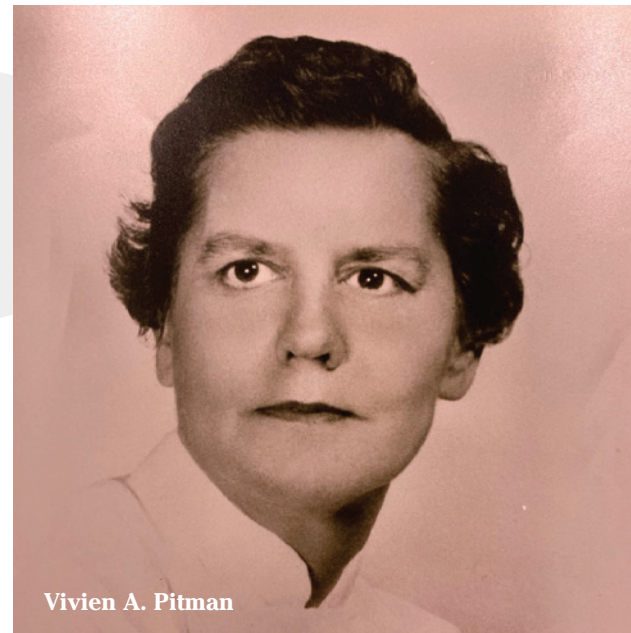
The Southern Maine Agency on Aging recently received a generous anonymous donation in memory of Vivien A. Pitman, of Saco. She will long be remembered for her services to her community.

Vivien graduated with a registered nursing degree from Maine General School of Nursing in Portland in 1936. In 1941, she was named an instructor at the Mercy Hospital School of Nursing. Throughout her career, she inspired numerous patients, nurses and doctors.

Vivien joined the U.S. Army Nurse Corps in 1942 and served in England. She was given a medical discharge after contracting tuberculosis.

In 1958, Vivien realized her dream of starting and managing a long-term care facility in South Portland. The home was a labor of love that quickly earned a statewide reputation for its exceptional care.

Although Vivien's life of service has ended, her legacy continues to inspire others. The donation received in Vivien's memory will go directly towards supporting SMAA's services and programs for older adults. The Agency is honored to continue Vivien's legacy of helping community members in need.



Vivien A. Pitman

Honoring the Legacy of Selma W. Black: Champion for Older Adults

We are honored to spotlight the legacy of Selma W. Black. Selma was a former volunteer and Board member of the Southern Maine Agency on Aging, a generous donor, and a fierce advocate for those facing hardships in the Maine community. She graduated from law school in 1937 at the age of 21 years old and became the first Federal Projects

Selma's legacy is important to keep at the forefront. Selma demonstrated an unwavering commitment to serve those in the community with the greatest need.

Coordinator in the State of Maine. She dedicated her life to helping others whether they were World War II refugees, underprivileged children in the community, or older adults facing economic hardships. Selma created the first Head Start program in the State of Maine. She held Board positions with the National Council of Jewish Women and Portland YWCA.

In 1984, Selma joined the Southern Maine Agency on Aging as a Board member and soon after became president of the Board of Directors. She devoted herself to the issues that older adults in the community faced and served countless hours helping to further SMAA's mission. Selma firmly believed that all older adults should have access to nutritious meals and was a strong advocate for the Meals on Wheels program.

As we honor and recognize folks in our 50th year, Selma's legacy is important to keep at the forefront. Selma demonstrated an unwavering commitment to serve those in the community with the greatest need and her legacy will live on as SMAA continues to provide resources and services to ameliorate the lives of the elderly in Southern Maine.

Selma's legacy was honored at SMAA's 2021 Charting the Future event and we awarded the Black family with the "Champion for Older Adults" award. We are grateful to Scott Black and his family for their continued generosity and support for older adults and the Meals on Wheels program in Maine.

Doug Wilson Rising Tide Award

In 2022, Southern Maine Agency on Aging lost Doug Wilson. Doug was a beloved part of the SMAA staff team, deeply invested in our mission for over six years. During the pandemic, Doug worked tirelessly with volunteers to help clients in the far reaches of our two counties. Doug coordinated the SMAA "Tech Pal" program and was a treasured part of the Plummer Senior Living community in Falmouth, where he served as Resident Resource Coordinator.

After his unexpected passing, the Southern Maine Agency on Aging, in partnership with the Maine Council on Aging and Community Health Options, established the *Doug Wilson Rising Tide Leadership Award*. The award recognizes and celebrates the sustained efforts of people who lift and inspire others to implement innovative solutions to challenges faced by older Mainers through collaborative partnerships, shared leadership, and community-building initiatives, the way Doug did. In 2022, Mary Ellen Wilson, Doug's spouse, received the award in Doug's memory.



Barbara Bock, Volunteer of the Year

"I volunteer because it gives my life purpose and the opportunity to give back. At SMAA, I have found a wonderful community where we support and challenge each other to live our best lives at this point in time. And, yes, because it is in giving that we receive!"

“ All of these programs are rewarding opportunities to work with people in our community and build new relationships with colleagues and clients”

Barbara is a retired executive from the Portland Press Herald/Maine Today Media. In 2018, Barbara began as a Money Minders volunteer and for nearly four years, she helped a client to manage their finances. When the pandemic began, Barbara and her husband joined

the Meals on Wheels team, where they “certainly felt ‘essential’” every time they left home to deliver meals to home-bound older adults. In the past two years, Barbara has also been involved with the Agewell Tai Chi Program as its volunteer coordinator.

“All of these programs are rewarding opportunities to work with people in our community and build new relationships with colleagues and clients, particularly as we are able to venture back to being in-person again. I also learn new things all the time through my experiences as a volunteer,” shares Barbara.



Keynote Speaker Beth Steinhorn and Jason Pierce, Humana

“ When working with volunteers...

1. Focus on relationship with mission, with each other, with community
2. Welcome innovation in all arenas
3. Leverage technology
4. Nurture volunteer leadership
5. Invest in volunteer engagement
6. Seek transformation, not just transaction when working with volunteers”

- Beth Steinhorn, President, VQ Volunteer Strategies

Thank you for your ongoing support!



Volunteer of the Year Barbara Bock and Julie Mascari, SMAA Board Member

Together Again: Celebrating Our Volunteers Who Make a Difference in Our Communities Every Day

In June 2022, we gathered to celebrate and recognize the tremendous impact SMAA volunteers have on the lives of our clients.

Nearly 400 Volunteers devoted 21,784 volunteer hours in 2022. That's equivalent to \$583,157 in donated time!

Volunteers deliver meals to homebound clients, provide companionship over the phone, assist member of our Adult Day program,

and share their talent, expertise and knowledge with our Medicare, Money Minder, and Agewell clients. Many of them participate in more than one program, and many of them are also generous donors – because they hold dear to their heart SMAA’s mission to empower older adults.

Better Together: Charting the Future 2022

Friends, donors, volunteers, sponsors, and community partners gathered on a beautiful September afternoon for the fifth annual Charting the Future fundraising event. Thanks to our community, we raised over \$51,000 to directly support Southern Maine Agency on Aging’s programs and services for older adults.

Charting the Future was an opportunity to recognize the importance of our 400+ volunteers’ efforts, commitment, and thousands of hours of volunteer work devoted to SMAA’s mission. From the inspirational message of Bill Hall, SMAA’s Advisory Council Chair, to the keynote speaker Beth Steinhorn, President, VQ Volunteer Strategies, we shared stories and mission moments that would not have been possible without our volunteers.

We recognized Catholic Charities Maine Refugee and Immigration Services as our Partner of the Year for their guidance and for teaching us how to connect in a culturally respectful way with New Mainers. Through their commitment to connecting older refugees to services and programs, many older refugees have accessed beneficial resources as a result of working with SMAA. In turn, SMAA is learning so much about community needs and becoming more culturally competent over time.

“ I have no doubt that SMAA will continue to find more partners in the many ethnic community-based organizations in southern Maine. You are charting a course for a more inclusive and accessible SMAA for older immigrants and we are grateful to be alongside you in that journey.”

- Tracy Moore, Refugee and Immigration Services, Catholic Charities Maine



Tracy Moore (middle) and guests

For over 50 years, Southern Maine Agency on Aging's work has been focused on older adults with the greatest social and economic needs. The National Center on Law and Elder Rights defines the term "greatest social need" as the need caused by non-economic factors such as physical and mental disabilities, language barriers, and cultural, social, or geographical isolation, including isolation based on race or ethnicity. SMAA regularly collects and analyzes disaggregated demographic data to help ensure we are reaching the people who need us the most - those who live in rural areas, are members of ethnic minorities, speak a language other than English, are older LGBTQ+ adults, are caring for someone with memory loss, and more.

Embracing Equity and Inclusion Practices



Participants in the first Tai Chi Class taught in Arabic with instructors

We champion diversity, equity, inclusion, empathy, and justice at SMAA. We practice these values by meeting our clients where they are:

- Language can be a major barrier for older adults who are not native English speakers. To facilitate broad access to our services and programs, we developed short, easy-to-navigate information sheets, translated into six languages – French, Kinyarwanda, Vietnamese, Spanish, Portuguese, and Arabic.

Information sheets are available for download and print online at SMAAA.org

- The two multi-lingual Tai Chi classes we led through our partnership with Catholic Charities and the New England Arab American Association have been a lesson on building trusting relationships and creating safe and supportive spaces. In 2021, we included culturally sensitive foods - halal meals - for the Meals on Wheels clients and have continued diversifying the food options in our As You Like It dine-out program through partnerships with restaurants serving different ethnic food.

Foods that As You Like It clients can enjoy in participating local restaurants include:

- Mediterranean
- South American
- Chinese
- Jamaican
- A partnership with Equality ME has allowed us to restart the pre-pandemic Community Café for older LGBTQ+ adults.
- We are expanding Community Cafes in the more rural parts of York and Cumberland Counties.
- For the past year, we have been publishing content in Amjambo Africa, a state-wide newspaper that reaches 10,000 New Mainers monthly. The articles vary in topic – from applying for Medicare, to access to state benefits and food programs – and many of them have been translated in multiple languages for readers still learning English.

From staff training to multilingual programming to listening to the needs of our communities, our Diversity, Equity, and Inclusion work has one major goal - that every client feels valued, respected, and safe when working with SMAA. Inclusion and equity practices remain an ongoing commitment for us.



First Tai Chi taught in French and Kinyarwanda. Photo credit: Tracy Moore, Catholic Charities

We believe social connectedness is essential for older adults to thrive and age well in their homes and communities. Southern Maine Agency on Aging's programs and services are inherently designed to support social connection and alleviate social isolation - the need for which has become even more apparent over the last three years.

Fostering Social Connections

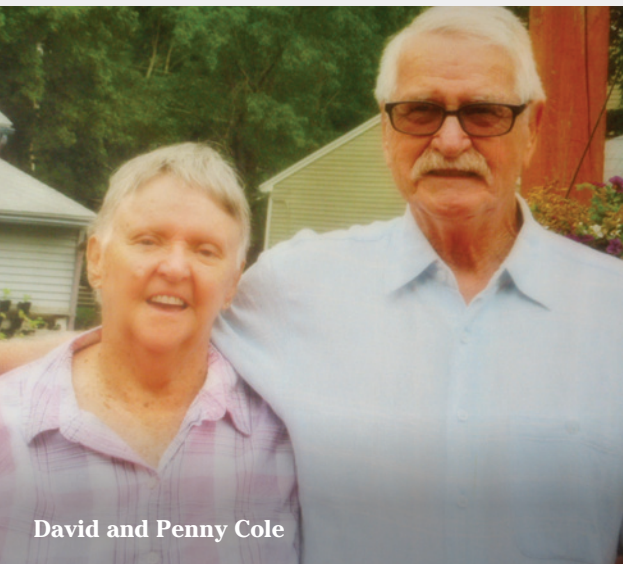
Phone Pals: Long-Lasting Relationships and New Sense of Purpose for our Meals on Wheels Clients

A volunteer-driven program, Phone Pals provide companionship to Meals on Wheels clients through weekly phone conversations about shared interests. Like Meals on Wheels food deliveries, a call from a Phone Pal volunteer is also a wellness check. Phone Pals are trained to detect changes in the emotional and physical state of the client and serve as true partners in decreasing social isolation and loneliness among homebound older adults. Close to 10% of our Meals on Wheels clients had a Phone Pal last year, and we are set to expand the program in the years ahead.

55% of our clients live alone

David and Penny: More than Meal Deliveries

David and Penny Cole have been delivering Meals on Wheels for 20 years. David describes himself as a reliable driver who enjoys delivering meals and talking to people. "A lot of the individuals enjoy having someone come in and visit for a while," says David. But the real talker is Penny. "She enjoys visiting with people. She does some errands for people. Like getting food for them at the store. And talking with them for a while."



David and Penny Cole

“Thank you again for this wonderful opportunity. Chatting with my phone pal continues to be a joy. We have shared topics from home cooking, to camping, to our favorite things about Maine, to life’s outlook, and experiences with grief after losing a spouse. Our talks are a bright spot in my day!”
- SMAA Phone Pal Volunteer

SMAA Community Cafes

In the past year, more than a dozen locations across Cumberland and York Counties hosted over 1,000 60+

The increasing popularity of our SMAA Community Café is a tell-tale sign of the growing need for social connections and access to a nutritious meal among older Mainers.

adults for a nutritious lunch, entertainment, and education. The increasing popularity of our SMAA Community Café is a tell-tale sign of the growing need for social connections and access to a nutritious meal among older Mainers. Through partnerships with other organizations, we've been able to offer more

Community Café locations, and are focused on ensuring that these locations are access points for more information and resources for SMAA services.



Biddeford Community Lunch Attendees

Agewell Wellness Programs: A holistic approach to living well

Some of our Agewell classes focus on improving participants' physical health (Tai Chi for Health and

155 Agewell sessions
25 virtual and in-person classes

Nearly 1 in 3 Mainers 65+ have reported falling in the past 12 months

Balance), while others (A Matter of Balance workshops) focus more on learning how to think differently about falls and fall prevention through discussions and peer support.

Class participants benefit from the support they receive from peers and volunteer leaders and the social connections they form. Many participants in the wellness classes repeat the classes because of the positive impact on their health and the opportunity to connect with others with similar experiences.

As we continue to strengthen our programs, work to reach diverse communities, and help build social connections for our clients, we are also looking outward. SMAA is building relationships in our communities and working with partners whose mission aligns with ours: to empower older adults, adults with disabilities, and their caregivers to live to their fullest potential.

“Congratulations, Southern Maine Agency on Aging, for 50 years of service to the communities in Southern Maine! The services and programs you provide make a big difference in the lives of older Mainers. You bring meals, provide family support, offer expert advice on insurance and drug benefits, and direct people to community resources to help with specific needs. Importantly, you provide critical leadership in Maine’s advocacy network, working to ensure supports and services meet emerging needs, and designing services that work for everyone, including diverse older people.”

- Jess Maurer, Executive Director, Maine Council on Aging



Conversation Cafés

Started during the pandemic to bring older adults together during the lock downs, SMAA’s Conversation Café is a virtual social gathering that demonstrates how technology can benefit and improve social connections. Volunteer hosts Rebecca Ankener and Carol MacDonald encourage discussion topics that many older adults can relate to – scams, mindfulness, grieving, journaling memories, and more – to create vivid conversations and moments for sharing laughs and giving each other support.

Adult Day Program as a “Social Club”

Did you know that we call our Adult Day Program at the Sam L. Cohen Center a “Social Club” and the participants are “members”? It is not accidental – the program is intended to increase the members’ cognitive and physical activity through social engagements. From playing games to sharing life stories and singing longstanding favorites, there are countless opportunities for members to interact with each other. In the past year, our membership has tripled!

Supporting the “sandwich generation” of caregivers

In 2022, we set up a new Facebook group, “Caregiver Support Network - Maine,” designed to bring caregivers from all over Maine together to share resources, ask questions, or simply vent and receive support from others who share similar experiences, feelings, and challenges. The social media group allows us to reach the “sandwich generation,” adults in their 30s and 40s who are caregivers of both their kids and aging parents while juggling work and community involvement.

Earning the Trust of Our Clients

For 50 years, SMAA has been the focal point in York and Cumberland Counties for information, services and resources that empower older Mainers, adults with disabilities, and their caregivers to thrive and age in their homes and communities. From ensuring our clients’ financial health to assisting them with benefits applications and providing ongoing support to caregivers, we have accomplished our mission when we see our clients regain their confidence and independence.

“Congratulations to Southern Maine Agency on Aging in their 50th Anniversary Year. We are grateful to Area Agencies on Aging like SMAA that continue to pave the way for innovative solutions for older adults. By working in partnership with their local communities, SMAA is making a difference.”

- Sandy Markwood, Chief Executive Officer, USAging



Biddeford Community Lunch Attendees

Providing Financial Security

Programs like Money Minders and Medicare Counseling allow clients to remain financially independent and save money on their health insurance options. Our State Health Insurance Assistance Program (SHIP) Counselors not only inform clients about their best health insurance options but also educate them on how to avoid scams. By providing this trusted, neutral and unbiased information, SMAA is helping more older adults get the education and information they need each year.

1 in 3 people we serve each year lives in poverty.

6,249 clients were connected with local providers and received support in applying for affordable housing and requesting assistance with heating, food, and prescription drugs costs. Our Community Services staff spent over 4,600 hours working with 1,856 clients with multiple needs and unique situations.



Bill, Adult Day Program Member and Marilyn Durgin, Program Coordinator

“ The spoon is [a symbol of] the common things between everybody [in the Adult Day Program]; the vine is how we all are intermingled and connected; and the flower is Marilyn in the group,”

- Bill, a member of the Adult Day Program at the Sam L. Cohen’s Center carved and gifted this spoon to Marilyn Durgin, our Adult Day Program Coordinator.

Supporting Clients to Receive Their \$850 Maine Relief Checks

In 2022, Governor Mills announced that the state of Maine would disperse nearly half of the budget surplus as relief checks to support Mainers in post-pandemic recovery. The primary requirement to receive a relief check was to have 2021 taxes filed in Maine. However, many older adults living on social security or just under the poverty line do not file taxes, which meant they would not be able to receive the \$850 relief checks.

Southern Maine Agency on Aging partnered with AARP Tax Aide Foundation to support older adults who hadn’t

In total, we estimated over \$150,000 in tax returns was accessed by these clients that would otherwise not have been received.

been filing their taxes to make it possible for them to receive the relief check. Our clients could also file for the Property Tax Fairness Credit. In three months, volunteers from the two organizations assisted

215 individuals in accessing the \$850 stimulus check and tax credits. In total, an estimated \$100,000 in tax returns was accessed by these clients that would otherwise not have been received.



Adult Day Program Members

In 2022, SMAA conducted Medicare 1:1 counseling sessions with 1,230 clients and held 34 virtual seminars, attended by 414 clients. This is in addition to the clients we help over the phone each day with Medicare questions, and the businesses who request Medicare seminars onsite to inform employees.

Supporting Caregivers’ Journey

Caregiving is not an obligation; it is a journey that many of us take because our loved ones need care and support during their lifetime. We believe caregivers should be supported throughout every step of their journey. Southern Maine Agency on Aging’s Family Caregiver Support Program acts as this resource. Serving the caregiver’s needs begins with an initial consultation with a Caregiver Resource Specialist, and continues with access

We believe caregivers should be supported throughout every step of their journey. Southern Maine Agency on Aging’s Family Caregiver Support Program acts as this resource.

to specialized training, support groups, a growing library of resources, in-person and virtual activities, and funds for respite care.

Over the year we compiled a library of useful resources based on the most common questions and issues the

Family Caregiver Support Specialists had to answer while working with caregivers. Topics covered how to determine who is an unpaid caregiver, how to deal with the sense of isolation many caregivers experience, and other commonly asked questions.

In the summer of 2022, we launched a monthly caregiver newsletter, both printed and digital, to provide the most up-to-date information and support.

We worked with 768 caregivers through 1-on-1 counseling or support groups and provided over 10,556 hours of respite for caregivers caring for someone with dementia.



Bill, Adult Day Program member and Marc Boissonneault, volunteer in the Adult Day Program

Building Community Awareness and New Partnerships

The Exchange: Southern Maine Alliance for Older Adults

Southern Maine Agency on Aging has a long-standing history as a convener and community builder in the aging landscape. Connecting providers and sharing vital information and resources has been a top priority since our inception in 1973. In 2022, we relaunched a networking group across York and Cumberland Counties, ensuring that direct service providers, volunteer organizations, and community partners could regularly connect to share information.

The Exchange: Southern Maine Alliance for Older Adults networking meetings started to solve a very practical need – organizations working on behalf of older adults lacked opportunities to connect with others working in the same space to share ideas, resources, concerns, and solutions.

The Exchange brought these problem-solvers together. In 2022, more than 160 representatives from local organizations came together to connect, collaborate, and seek solutions to the challenges impacting the quality of life of older Mainers. Its goal is to become a driving force in fostering broader community conversations and advocating for those we serve.

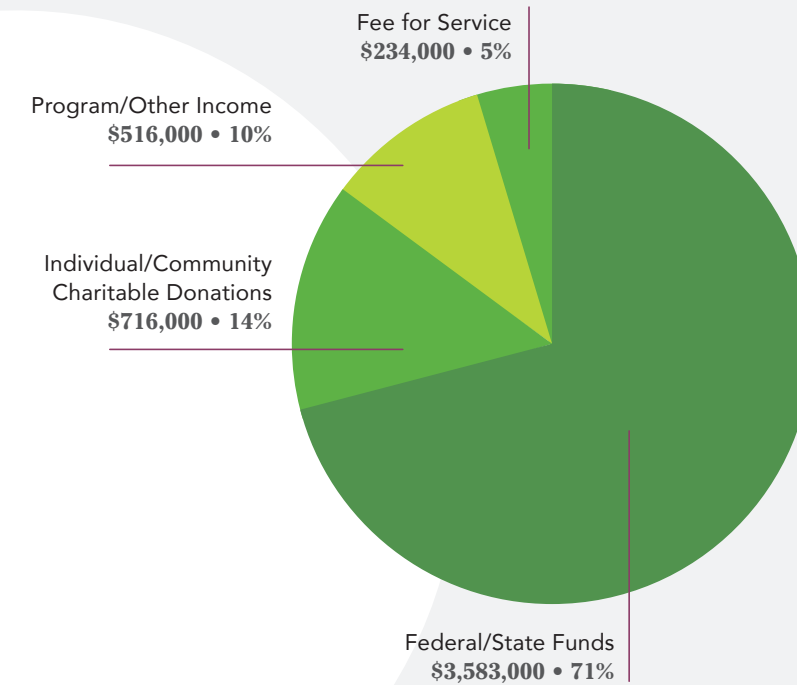
Cabinet On Aging Established in 2022

On June 13, 2022, Governor Mills signed an executive order establishing the Cabinet on Aging. The Cabinet advances policies that will support Maine people in aging safely, affordably, and in ways and settings that best serve their needs. The Cabinet will bring together State government agencies to improve coordination and accelerate action. The Cabinet will coordinate and advance work on affordable housing and long-term services and supports; financial security and protection against fraud; access to information, broadband, and services; and engagement and employment in Maine’s growing economy.

SMAA CEO Megan Walton, joined by DHHS Commissioner Jeanne Lambrew, Commissioner Laura Fortman and Cedars CEO Kathy Callnan, spoke at the event. “Today, more than ever, the aging population in Maine needs our help,” said Walton. “Through the creation of the Cabinet on Aging, we will shine a light on the older adults in our state who need information, resources, tools and support to live and thrive in their own communities.”

Financials

Revenue for the Fiscal Year Ending 9/30/22: \$5,049,000



Expense by Program for the Fiscal Year Ending 9/30/22: \$4,880,000

