The Vidda Foundation

Final Report Form

The purpose of the Report Form is to help Vidda Foundation's Trustees understand the activities and outcomes of your grant. This form is now part of the proposal process. **Your application for funding will be considered incomplete without it.** Please upload this form along with your grant proposal via the Information Upload link at https://www.vidda.org. If you have any questions about the process, please contact grants@vidda.org.

Instructions

Grantees may choose to complete the form below or format their own Word document. Both allow for copy-paste from existing reports to other funders. Regardless of approach, we request that all grantees please:

- Type and single-space all reports.
- Use headings as provided.
- Answer all questions in the order listed. If a question does not apply, please respond "NA" or "Not Applicable".
- Indicate if information is being provided in a separate attachment (e.g. budgets or financial statements). If requested attachments are not available, please include an explanation.
- Use as much space as needed, while being as concise as possible.

The Vidda Foundation
Final Report of
Search and Care

on grant period beginning 1/22/2026

NARRATIVE

1. **Major Objectives**
   List the major objectives of the grant as specified in your original grant proposal. Describe the progress toward accomplishing your objectives and note the number of persons affected by your activities (when appropriate).

   Social Work/Care Management: This year we provided nearly 900 clients with Care Management services—700 NYC Aging (formerly Department for the Aging) case management contract clients as well as 197 Community Clients.

   Money Matters: We were able to support 150 clients with about 1,900 contacts.

   Pet and Elders Together: We provided 170 stipends to 53 clients for pet food/supplies, vet care, and other pet services (grooming, euthanasia, etc.), totaling close to $42,000.

   Nutrition and Emergency Groceries: We provided 105 clients with Nutrition/Grocery services as follows: 51 clients received 218 individual nutritional counselling and/or group sessions; WSCAH (West Side Campaign Against Hunger) made 379 deliveries of fresh produce and nutritious grocery items to 58 clients since October; 24 clients received 96 grocery orders from our internal Emergency Groceries Fund.

   Groups: We have reached over1,600 total attendees at our on-site, virtual/hybrid, and external group presentations.

   Silver Circles Tech & Telehealth Education: 250 clients received Silver Circles support through 1-1 assistance from Computer Coaches (200 clients) and/or group activities (71 clients). About 1/5 of the 540 1-1 sessions provided by our Coaches included MyChart/Telehealth support. Additionally, our external tech/telehealth presentations garnered 250 total older adult attendees from the community (125 for telehealth presentations).

   Medical Escorting: Our Medical Escorts accompanied 62 clients to 255 appointments.
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2. **Outcomes**

What outcomes have been achieved over the grant term? Was it necessary to make any modifications to the program? Are you on schedule? If the grant did not achieve some of the objectives above, please explain.

We are pleased to have been able, with Vidda Foundation's help, to keep supporting our clients through intakes, services, information, monitoring, and referral; ensuring that all clients receive benefits and entitlements they are eligible for; and ensuring they are aware of and have access to our wraparound services as appropriate. We have continued to expand our services In FY26, we served approximately 2,165 Search and Care clients, a 24% increase over FY25. Additionally, we made presentations to nearly 400 total older adult attendees from the community at partnering organizations on Tech topics and Advance Pet planning, 25 young participants of our monthly iChoose program at Central Park East High School, and 146 partner organization staff members. Over one quarter of our active clients have received more than one service from us.

We noted in our proposal when discussing our MyChart/Telehealth initiative: "*A key focus is replicability and the dissemination of its successful model. We will disseminate findings at professional conferences, including the New York State Society on Aging's annual conference scheduled for October 6, 2025. This dissemination aims to encourage other practitioners and providers to adopt the model."*

The Silver Circles team did present at the October NYSSA conference on the successful Telehealth Access pilot project with Metropolitan Hospital that launched in March 2024. Our ED characterized the presentation as follows: *"It was a lively talk, and [the team] received many great questions and responses. It was an excellent representation of our work at Search and Care - and all the work put into this initiative."* The Team made a similar presentation at Hunter's Silberman School of Social Work in the spring on the "Silver Circles Digital Health Equity Initiative," which was also well-attended and generated healthy discussion.

Our Pet Coordinator, Robin has also been focusing on dissemination of Advance Pet planning and other pet issues. Robin has done a number of staff trainings on Advance Pet Planning (some jointly with PAWS NY), including Community Board 7 Senior Task Force, The Junior League (later followed up by a volunteer initiative to introduce wallet cards to pet owners in Brooklyn), discussions and training with four elected officials and their staff, the Silberman Conference, staff at Encore and Carter Burden agencies, and the NYS Judicial Committee on Elder Justice. Continuing into FY27, Robin has been actively promoting and coordinating a Human Service/Animal Welfare Collaborative. This July, she co-hosted, with PAWS NY, a meeting of the group, which currently includes nine representatives from gov't and non-profit groups who are passionate about seniors and pets, and concerned about advocating for their welfare.

We believe that our wraparound programs and our outreach efforts have led to healthier outcomes for our clients and external audiences, and increased awareness of their value to staff and seniors throughout our communities.

3. **Evaluation & Learning**
Briefly summarize the evaluation process for the effectiveness of the grant. What have you learned from your own evaluation? Describe any lessons you learned in carrying out the objectives (improved processes, new strategies, unexpected obstacles or results, etc.)

Search and Care maintains its own database to keep track of client activity. We also do satisfaction surveys for individual programs, conducted by volunteers by phone. Over the years we have found that phone interviews work best for our clients, as many have muscular or vision problems which impedes them filling out surveys on their own, and many are uncomfortable or lack tech skills to answer online surveys. This fiscal year we are surveying clients in our Pets and Elders Together Program. With limited responses so far (18 clients), respondents have provided unanimously positive praise for the program coordinator and their relationship with her (e.g., "Absolutely delightful. She's cheerful, intelligent, everything you would want for this position."), and every respondent reported they felt the program has been responsive to their needs for supporting their pet(s) ("100%! … It's a beautiful program. I am happy to have discovered it."). Some respondents also let us know what other supports they would like, which has been relayed to the Coordinator-- "Need more cat info." "Please send info about pet events." "More pet food giveaways, but any little bit helps!"

We also use our monthly Client Advisory Group meetings, usually attended by 6-8 clients, to get ideas and feedback for future activities. At their request, we have also been holding more workshops and presentations related to helping clients continue to live independently in their homes, including Advance Directive, Avoiding Falls, and Navigating Home Care.

We also conduct periodic check-ins with our staff for their feedback. One issue we have been dealing with since expanding our NYC Aging (formerly Department for the Aging) case management sub-contracts in FY 2025 is the requirement for tracking these clients in their own database as well as our own, which has been a hardship for staff along with the increased caseloads. Compounding the problem, NYC Aging rolled out a new database system for NYC Aging client documentation at the beginning of the year, which our Care Managers are still familiarizing themselves with. Worker consensus is that the new system is more difficult to navigate and does not generate aggregate reports that we could use to verify our own data. It has proved challenging for Care Management staff to keep up with documentation in both systems. Despite this, staff began an effort to ensure that NYC Aging client information is entered into our own system as well. This effort is helping staff to coordinate services better as Care Managers can see any Supportive Services notes.

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4. **Notable Accomplishments**

What do you consider your most notable accomplishments during the past year?

- With Vidda's support, the Money Matters program has been able to maintain the program for the 5th year in a row with no waitlist. In addition to helping clients manage their finances and secure additional benefits/stipends when needed, the Money Matters team, with its consistent account monitoring, has saved clients thousands of dollars by identifying erroneous or fraudulent charges.

- At our most recent staff check-in meeting, This year our two Care Management Supervisors (East Side and West Side) report that their Care Management teams have developed rapport and have solidified their abilities to handle their caseloads. SWs have strengthened their ties with outside partner agencies as well as familiarity and communication with our internal support staff and programs in order Our Care Management clients are able to reap the benefit of Search and Care's array of services beyond securing public benefits, and have training and in-house personnel and resources to support clients with multiple issues. For example, one of our Care Managers recently worked with the Money Matters coordinator to obtain 2 grants for a client who was having trouble paying her bills. The Money Matters Coordinator also referred the client for our emergency grocery program, and she has received 2 grocery deliveries so far this year.

- Our partnership with Mt. Sinai's The Martha Stewart Center for Living, which began last July; we currently have one of our younger participant tech coach interns on site once a week to work individually with patients to help them access and navigate MyChart and provide instruction on how to have telehealth appointments. Clinic staff also refer patients to us so we can provide telephone or in-home visits.

- Buoyed by a generous grant from the Eisner Foundation, we have been able to increase our focus on intergenerational programming--integrate younger participants into our programs and activities—from the high school and college volunteers and interns who work one-on-one with tech-challenged clients, make calls to former clients on our watch list, remind clients about group activities, and help those who want to merge by phone into virtual groups; Brick Church volunteers who made Valentine's Day calls to isolated clients; students in the iChoose program at Central Park East High School who interact with older mentors, and the "Bow and Blossom" teenage string duo who have performed at several of our events. Since the Eisner grant began in January, we have engaged about 80 younger participants so far.

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5. **Challenges & Obstacles**
What were the greatest challenges/obstacles you faced while developing and implementing the program(s)?

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- As noted in the Evaluation and Learning section above, NYC rolled out a new database system for NYC Aging case management contract client documentation at the beginning of the year, which our Care Managers are still familiarizing themselves with. Worker consensus is that the new system is more difficult to navigate and does not generate aggregate reports. At the same time, we expect Care Managers to also document contacts in our in-house system so we can track and coordinate all program services to a client, and for aggregating data. It has proved challenging for Care Management staff to keep up with documentation in both systems.

- A particular strain for many older adults is not being eligible for home care, or not having enough home care time. Thus, less mobile clients may request more support from us, such as grocery deliveries, out of physical, more than financial need. (One of the Client Advisory participants expressed gratitude for a recent WSCAH grocery box delivery as she didn't feel able to go out during the heatwave.) We do not always have the capacity to help in these situations. For example, the case manager at another agency asked us to commit one of our Medical Escorts on a continued basis, for sixteen weeks, which would have strained our pool of Escorts.

- It has become even more difficult and time-consuming for both clients and staff to reach workers at government agencies responsible for approving and coordinating benefits to clients. Attempts to get through to HRA regarding clients' issues with benefits have been described as "brutal," with hours-long times on hold. (Staff waiting on the phone with clients to talk to a representative for 3-4 hours is not uncommon.) Websites and portal instructions are described as "vague" and "opaque" and regular mail is often delayed or sent to the wrong address. Clients' applications or recertifications can be rejected for unclear reasons. Cases requiring multiple calls, appeals, and even in-person visits to agencies with the clients may be a small portion of a Care Managers caseload, but they become the most time-consuming.

- In supporting patients with accessing and using MyChart/Telehealth portals, Computer Coaches and Program staff have noted that a number of their issues arise due to individual site's tech requirements (e.g., using specific browsers, asking for insurance information before allowing telehealth setup) or software glitches that require the assistance of Help Desks or other IT staff. Program staff have developed relationships with IT staff, for example working with them to get access to more telehealth portal screens to show in our group presentations, so patients are aware of next steps.

6. **Partnerships**
What other organizations/coalitions have you worked with to achieve these goals?

Search and Care works with a broad network of over 50 partners to serve individual clients and collaborate on programs. Important partners this year include:

- Carter Burden Network and Encore—continuing subcontracts for DFTA clients
- Mt. Sinai's Martha Stewart Center for Living and Metropolitan Hospital: partnerships with clinical and IT staff
- West Side Coalition Against Hunger: delivering grocery boxes to clients.
- Carte Blanche Foundation: supporting our renovation with funds as well as design expertise.
- Prep for Prep, Regis High School, PACE University, Hunter, Fordham University, and Columbia University: sources for young participant volunteers.
- PAWS NY: joint grant applications and presentations
- Central Park East High School: iChoose pregnancy prevention/leadership program
- External Pet and Search and Care presentations at 20+ organizations including social work agencies, housing projects, officials, hospitals, etc.

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7. **Looking Ahead**
What opportunities and challenges do you foresee for the near future?

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- Our refurbished outdoor space and participatory activities will continue to attract clients (over 50 attended a Garden Gathering in June) and will be an integral part of our offerings. Unfortunately, climate change (heat, rain) is affecting our ability to keep the space open and we will need more protective equipment (e.g., awning and fans).

- With the success of our external Tech and Pet presentations, we anticipate that additional organizations will request them. As our tech coaching and other intergenerational activities grow, we may need to find additional strategies to recruit younger participants.

- Many clients continue to experience difficulty with ever-rising costs of necessities. Some clients with income on the higher end of the low-income spectrum still struggle to make ends meet because they are over the income limit for many public benefits. A new trend is clients failing to qualify for benefits on NYC Aging's 2-step assessment because they are considered to be doing "too well." At the same time, it becomes more difficult to obtain ongoing financial assistance for clients each year due to stricter requirements by stipendiary agency boards. The Senior Citizen Rent Increase Exemption income limit

increased to $75,000/yr will help, but for a large number of people, their rent is already at a level where a freeze wouldn't make much of a difference.

- There is clearly a need for more services like ours, as Coordinators at a number of our Supportive Services report that they are getting more requests than ever from older adults outside our catchment area, which we can only accommodate if the service can be provided virtually, and if there is sufficient personnel and funds. As one of these Coordinators noted, 'Systems are definitely broken."

8. **Financial**
Please provide income and expense information to date for the program(s) funded by the grant. Describe any budget changes or financial adaptations.

N/A. It was a general operating support grant.

9. **Suggestions**
Do you have suggestions for ways to improve the Vidda Foundation's grant, proposal, and evaluation processes? Feel free to answer in the space provided below. Alternatively, these may be submitted anonymously by mail to:

The Vidda Foundation
c/o TCC Group
333 Seventh Avenue, 9th Floor
New York, NY 10001

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OPTIONAL ATTACHMENTS

If you wish to attach relevant materials, newsletters, articles, etc. that you feel would provide Trustees with a better understanding of your activities and accomplishments, please include here. If materials are attached in a separate document, please include a list of attachments.

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