

WALLINGFORD COMMITTEE ON AGING

OPERATING ACCOUNT

FISCAL YEAR JULY 1, 2025-JUNE 30, 2026

OPERATING & TRANSPORTATION ACCOUNT	BUDGET SUBMITTED	JULY 2025 ACTIVITY	TO DATE BALANCE FORWARD	YEAR TO DATE BALANCE	BUDGET UNDER or (OVER)
Checking Account 07/01/2025				\$ 16,691.95	
Checking Account 07/01/2025					
Receipts Operations					
Town Contribution	\$ 866,305.00	\$ 72,192.00		\$ 72,192.00	\$ 794,113.00
Memory Lane Income	\$ 60,000.00	\$ 5,795.00		\$ 5,795.00	\$ 54,205.00
Interest	\$ 20.00	\$ 0.07		\$ 0.07	\$ 19.93
Miscellaneous*	\$ -			\$ -	\$ -
Carryover Budgeted	\$ 9,895.40	\$ 824.62	\$ 824.62	\$ 824.62	\$ 9,070.78
Total Receipts-Operations	\$ 936,220.40	\$ 77,987.07	\$ 824.62	\$ 78,811.69	\$ 857,408.71
Receipts Transportation					
Town Contribution	\$ 219,205.00	\$ 18,267.00		\$ 18,267.00	\$ 200,938.00
Bus Income	\$ 3,500.00	\$ 219.00		\$ 219.00	\$ 3,281.00
Carryover Budgeted	\$ 3,298.47	\$ 274.87	\$ 274.87	\$ 274.87	\$ 3,023.60
Total Receipts-Transportation	\$ 226,003.47	\$ 18,486.00	\$ 274.87	\$ 18,760.87	\$ 207,242.60
TOTAL ALL RECEIPTS	\$ 1,162,223.87	\$ 96,473.07	\$ 1,010,731.15	97572.56	\$ 1,064,651.31
Disbursements Operations					
Salaries	\$ 646,584.00	\$ 52,175.13		\$ 52,175.13	\$ 594,408.87
Payroll Taxes	\$ 49,892.00	\$ 3,906.74		\$ 3,906.74	\$ 45,985.26
Pensions	\$ 29,579.00	\$ 3,008.34		\$ 3,008.34	\$ 26,570.66
Health Benefits	\$ 118,341.00	\$ 4,835.59		\$ 4,835.59	\$ 113,505.41
Workers Comp	\$ 3,500.00	\$ 381.75		\$ 381.75	\$ 3,118.25
Staff Travel	\$ 2,100.00	\$ 205.80		\$ 205.80	\$ 1,894.20
Meetings, Seminars, Dues	\$ 3,250.00	\$ 308.19		\$ 308.19	\$ 2,941.81
Liability Insurance	\$ 25,307.00	\$ 2,007.00		\$ 2,007.00	\$ 23,300.00
Telephone	\$ 3,600.00	\$ 399.23		\$ 399.23	\$ 3,200.77
Office Expenses/Supplies	\$ 6,400.00	\$ 565.04		\$ 565.04	\$ 5,834.96
Equipment	\$ 2,100.00			\$ -	\$ 2,100.00
Maintenance/Repair	\$ 3,300.00	\$ 1,033.00		\$ 1,033.00	\$ 2,267.00
Facility Expenses & Suppl	\$ 7,400.00	\$ 494.48		\$ 494.48	\$ 6,905.52
Audit	\$ 9,500.00	\$ -		\$ -	\$ 9,500.00
Memory Lane Expenses	\$ 7,000.00	\$ 439.48		\$ 439.48	\$ 6,560.52
Miscellaneous*		\$ 20.00		\$ 20.00	\$ (20.00)
Town Building Lease	\$ 1.00	\$ 1.00		\$ 1.00	\$ -
Postage	\$ 250.00			\$ -	\$ 250.00
Printing	\$ 2,500.00	\$ 325.00		\$ 325.00	\$ 2,175.00
Prof Services	\$ 7,500.00	\$ 1,385.68		\$ 1,385.68	\$ 6,114.32
Continuing Ed & Training	\$ 800.00			\$ -	\$ 800.00
Disbursements Operations	\$ 928,904.00	\$ 71,491.45	\$ -	\$ 71,491.45	\$ 857,412.55

FY JULY 1, 2025-JUNE 30, 2026

OPERATING & TRANSPORTATION ACCOUNT	ANNUAL BUDGET	JULY 2025 ACTIVITY	TO DATE BALANCE FORWARD	YEAR TO DATE BALANCE	BUDGET UNDER or (OVER)
Disbursements-Transportation					
Salaries-Drivers	\$ 149,066.00	\$ 11,794.58		\$ 11,794.58	\$ 137,271.42
Payroll Taxes	\$ 12,834.00	\$ 902.26		\$ 902.26	\$ 11,931.74
Pensions	\$ 7,453.00			\$ -	\$ 7,453.00
Health Benefits	\$ 19,501.00			\$ -	\$ 19,501.00
Workers Compensation	\$ 12,150.00	\$ 1,145.25		\$ 1,145.25	\$ 11,004.75
Maintenance	\$ 6,250.00			\$ -	\$ 6,250.00
Fuel	\$ 13,230.00	\$ 460.13		\$ 460.13	\$ 12,769.87
Insurance	\$ 3,080.00	\$ 3,165.00		\$ 3,165.00	\$ (85.00)
Bus Lease	\$ 1.00	\$ 1.00		\$ 1.00	\$ -
Disbursements-Transportat	\$ 223,565.00	\$ 17,468.22	\$ -	\$ 17,468.22	\$ 206,096.78
TOTAL DISBURSEMENTS	\$ 1,152,469.00	\$ 88,959.67	\$ -	\$ 88,959.67	\$ 1,063,509.33
Checking Account 07/31/2025				\$ 25,304.84	
				\$ 1,099.49	Sheet 1 E13 + E 19
				\$ 24,205.35	
Allocated to 2025/26 budget	\$13,193.86				

Executive Director Report to the WCOA Board for the 8-15-25- No Meeting

Days of Service:	22	Memory Lane Units:	140
Recorded Attendance:	5,557	Health Service Units:	
Transportation Units:	1,116	New Members:	46
Community Café Meals:	146	New Members 55-59:	1
Social Service Units:	394	Total Members:	4,142

- It is with much sadness that I share with the Board that Mike Soares, our long time driver and transportation coordinator, passed away earlier this month. We plan to purchase and dedicate a bench to him with the money donated in his honor.
- I have continued working with DPW on replacing the fire panel now that it is obsolete and won't work with any new devices we install. The director informed me that the town has contracted with a new vendor to support these systems and he will arrange for them to come out and inspect the panel.
- Still working with GTG to upgrade and replace our computers. I have made specification requests and they are revising their quote. We also need a Firewall for security and Wifi nodes to increase our capacity for members and staff to use internet throughout the building. I should have a final quote for the September meeting.
- I have officially rejoined the Quinncipiac Chamber of Commerce and plan to attend various events throughout the year.
- Joined the National Council on Aging and have access to all their resources.
- I have had several department specific meetings to learn more about each group's dynamic and their needs. These meeting included volunteers that work in those areas so we can support them more effectively.
- The WSC team has implemented our new membership guidelines with a great deal of positive feedback. I am working on revised the membership booklet and creating a welcome packet so everyone gets the information they need.
- Starting in September and continuing quarterly, I will be hosting a member "Town Hall" style meeting titled "Ask the Executive Director". This should give people I don't see regularly an opportunity to share requests, feedback and likes and dislikes with us so we can continually improve our programs and operations.
- Met with Mayor Cervoni and several other employees at the town hall to introduce myself and start building strong relationships. So far those have gone well.
- We started an educational program series at the library to reach a larger group of potential members on a quarterly basis. Joanne Hummel will be our first speaker on Medicare and the process of choosing coverage from traditional Medicare, add-on plans, advantage plans and Medicaid supplemental plan.
- We are holding a joint staff meeting with SCOW in September to get to know each other's services better and mingle.

PROGRAM DIRECTOR'S REPORT

JULY	2025				
WEEKLY ACTIVITY	PD INSTRUCTOR	VOLUNTEER-LED	SESSIONS	ATTENDED	
Attendance Driver Club 60		X			
Art Appreciation		X	4	52	
Acting Studio	X		5	48	
Artist Studio		X	5	29	
Ballroom Dance Lessons	X		5	72	
Basic Social Dance Tues/Thur	X		7	82	
Bible Discussion Group		X	5	70	
Billiards		X	22	293	
Bingo		X	10	449	
Bocce		X	8	98	
Body in Motion	X		9	167	
Bridge (Tuesday & Friday)		X	8	77	
Canasta		X	6	36	
Cardio Drumming	X		2	31	
Club 60 Plus Fitness Center		X	22	857	
Corn Hole		X	3	29	
Clay Class (Mon)			4	44	
Clay Class (Tue)		X	5	10	
Craft Corner		X	6	56	
Cribbage		X	4	56	
Dominoes		X	4	22	
Drumming - Basic + Advanced	X		8	45	
Golf League		X	9	346	
Harmonica Group		X	4	12	
Hiking (Community Lake)			1	8	
Knitters and Crocheters		X	3	25	
Mah Jongg & MJ Lessons		X	11	157	
Nickel-Nickel		X	6	43	
Other					
Parkinson's Fitness Class	X		9	68	
Pickleball		X	5	50	
Pinochle		X	3	25	
Quilting		X	5	45	
Scrabble		X	5	23	
Set Back		X	6	47	
Shuffleboard		X	5	17	
SilverSneaker Boom	X		5	65	
SilverSneaker Circuit	X		4	61	
SilverSneaker Classic (T,TH)	X		9	153	
SilverSneaker Chair Yoga	X		5	62	
Strength and Balance Class	X		8	138	
Tai Chi + Beg Tai Chi	X		7	65	
Tap Dance		X	3	28	
Texas Hold'em			4	43	

PROGRAM DIRECTOR'S REPORT

Total Fitness	X		17	150	
Yoga Gentle	X		5	20	
YogaChair	X		5	56	
Zoom Classes	X		13	48	
WEEKLY ACTIVITIES TOTALS			309	4,378	
MONTHLY ACTIVITIES	Pd Instructor	Volunteer Led	SESSIONS		
AARP Driver Safety Program	X		1	6	
AARP Technology		X	0		
AARP Night Driving		X	0		
Caldwell Bank Realty		X	1	4	
Billiards Tournaments			0	0	
Birthday Party			1	17	
Book Club		X	1	22	
Chess Club		X	4	10	
Curiosity Club			1	30	
Foot Care Clinic		Dr. Gambardella	0	0	
Free Hearing Services		Home Hearing	1	2	
Military Whist Card Party		X	1	40	
Movie Matinees			3	32	
Parkinson's Support Group	X		1	8	
Q&A with the WPD		X	1	20	
Reiki Treatments	X		0	0	
Veterans Coffee House		X	1	50	
Wills, Trust and Probate		X	1	12	
MONTHLY ACTIVITIES TOTALS				253	
GROUPS & WKSHOPS					
A.G.E. Workshop		X		X	
iPhone Workshop		X	1	10	
iPad Users' Group		X	1	1	
Support Group		X	5	49	
T.A.B.s		X	0	0	
Jam Band		X	3	30	
GROUPS & WKSHOPS TOTALS				90	
SPECIAL EVENTS					
Lake View & R Band	7/10/2025			52	
R Band 6:30 PM	7/10/2025			140	
Lake View & R Band	7/17/2025			50	
R Band 6:30 PM	7/17/2025			120	
Lake View & R Band	7/24/2025			55	
R Band 6:30 PM	7/24/2025			150	
Lake View & R Band	7/31/2025			52	
R Band 6:30 PM	7/31/2025			135	

PROGRAM DIRECTOR'S REPORT

Mett ANN ZAK Ice Cream	7/14/2025		1	75	
Sound Healing	7/11/2025		1	17	
ShopRite Ice Cream	7/29/2025		1	30	
Idea Factory - Earrings	7/16/2025		1	13	
SPECIAL EVENTS TOTALS		Total	3	889	
<u>MEETINGS ATTENDED BY PROGRAM DIRECTOR</u>					
Hospitality Committee			1	16	
WCOA			1	12	
Staff Meeting			1	10	

June/July Notes:

Trips Comission: June

June 25 Summer Breeze Amarante - Attendane - 4

July 23-25 NOAH Lancaster, PA - Attendance - 21 - (\$1244.2)

July 17 Martha's Vineyard - Attendance - 44 - (\$391.6)

Club 60+

June: Silver Sneaker- 1232 swipes \$2,178.00
Renew Active - 489 swipes \$981.00

Programs:

R Band

Promotion:

Social Service Monthly Report

Joann Hummel Social Service Coordinator

Month: JULY 2025

Social Service Coordinator completed 394 units during the month of July. There were 2 wellness checks completed this month. One was a result of EMT call from the Wallingford Fire department requesting that I contact a resident that they responded to the night before and the 2nd wellness check was from the individual herself. Both were offered resources in counseling, home care and transportation services.

The Wallingford Senior Center has become a distribution center for people 60+ and who are eligible to receive the Senior Farmers Market Nutrition Program eCards to shop for fresh Ct grown vegetables, fruit, fresh cut herbs, eggs and honey at farmer markets and stands throughout Ct. Each card will be uploaded with \$40. The eCards were received at the end of July and in August I will begin the process of assisting Wallingford residents in completing the application on line and downloading the money to each card. I am very excited to be offering this to our community.

In addition to the Senior Farmers Market program (SFMP), The Connecticut Food Share mobile pantry continues to come twice a month to offer fresh food and pantry items to the Wallingford residents. The coordinator of Ct Food Share informed me that the amount of people served at our location has doubled from their previous location. A greater increase is also seen during the holidays and the warmer months. They are very grateful to have us as a partner to help individuals with food insecurity. People continue to express how grateful they are for having the Ct Food Share Mobile Pantry so close to their home. It is truly helping them every month. We are honored to partner with Ct Food Share and will continue to provide a safe and convenient location for them and the community.

Housing and affordable rents remains a need and concern in the state of Ct, and in particular in Wallingford. The Wallingford Housing Authority and Silver Pond Carabetta Managed Apartments, continue to have a wait list. Frequently, people who live in other towns may be next on the list to secure a low-income apartment in Wallingford. The options for senior housing for Wallingford's aging community regardless of income are limited; however, retired people who are on a fixed, limited income, below market value housing options are too few and far between.

Many people on a single fixed income are unable to pay for a \$1700.00 or more rent in Wallingford. Discussions on the difficulty of meeting their personal needs for food, utilities, and medical concerns when they fall just above the eligibility criteria has become a frequent occurrence. As rents increase so does the housing insecurity. As a community we need to become creative in our approach to housing and create options for all ages and incomes for our town and people to thrive.

I continue to be involved in the Wallingford Works for Housing (WWFH), with Ben Fink from SCRCOG and other community leaders, service providers, relatives, town employees, and retirees. Our goal is to raise community awareness and support for expanded housing options. We want as many people as possible to be informed and involved. There are challenges wherever you are on your housing journey and all ages are affected. Together, we are building relationships with our neighbors, our town officials, and those in other towns as we work toward common goals. Our goal is housing for all, economic growth, and a healthy future for Wallingford. I have attended Planning and Zoning community meetings at the Wallingford Town Hall and have appreciated that our town is taking notice and having healthy discussions about adding more affordable options for people. Mayor Cervoni has attended our WWFH community meetings and expressed to the community attendees that he is committed to expanding senior housing in Wallingford. On July 30, 2025, the Senior Center hosted WWFH community meeting to update the Wallingford community on the progress that the WWFH has made thus far. Kevin Pagini, Wallingford Town Planner updated the community that the Wallingford Planning and Zoning

approved the plans for the Boat House Senior housing project. A proposal for funding the pre-planning budget was submitted to the Connecticut Housing Commissioner. This budget includes a site survey, wet lands delimitation, and three potential building concepts. If the state does not fully fund this phase, funding then will be discussed with the Town Council. Mr. Pagani informed the community the complexity of the multi-step project. It will be Wallingford's first project of this kind and scale, so it represents a strong town commitment to alleviating the housing crisis. He also discussed housing options being considered that are units, below -market cost that the town is discussing development on North and South Colony and Kandracki Lane. Wallingford Works for Housing is having a very positive effect within the community, and our town government is recognizing that having more options for our senior community is critical.

Weekly support groups held at the WSC continue assisting people who are grieving, feel alone, are overwhelmed by their stress and anxiety. We have been successful in creating a safe place for them to express their emotions and needs. Each month, community residents are calling requesting to join the support group. Grief is an emotion that feels like company that they never requested to have. A powerful emotion that comes in waves. Our group is learning to manage the unwanted company of grief. Understanding ways to allow it in and then adding balance back into their life. Learning how to allow the emotion of grief not to overstay its welcome, is a learned skill. All are working hard to continue to develop this skill. The group has found comfort to know they are not the only one feeling the emotions that they are trying to manage. They are also able to see their stability and help others to know there is hope, that the deep pain changes in time. They are welcoming the guidance from us to help them seek a new vision in their despair.

The group is also learning how to improve their inner language on how they define themselves. Using less blame and negative statements and keeping the thoughts in the present time instead of the future helps them to reduce their anxiety and stress. The support group offers them a place to express their concerns and find ways to help them feel more comfortable in their environment. The development of trust and friendship among the attendees continues to be appreciated. They are welcoming to all new participants joining the support group, and each new person has expressed gratitude for the warm welcoming. The support groups meet every Tuesday from 2pm-3:30pm Co Facilitated by Jackie McNamee LFP and Joann Hummel SSC.

The month of July, resources that were offered to the community are as follow: Counseling on Medicare and Insurance Plans; SS Disability; Housing; Assisting in Food Insecurities and completing SNAP applications; Ct Food Share Mobile Pantry; Senior Farmers Market Program, Medicare Savings Program applications and DSS redeterminations assistance; DMV assistance; Cancer patient advocacy and Counseling; Grief counseling; Computer assistance; Review mail and assessing for scams; Locating community transportation companies; Assistance in securing Home Health Care and Senior Living; Co -facilitating weekly Support Groups.

Social Service resource agencies contacted or referred out during the month are as follows: 211 Homeless Response, Wallingford Community Alliance, Agency on Aging; DSS; SSA; Medicare; Franciscans Home Health Care; Assisted Living, Executive Home Care; Compassionate Care; Always Best Care; Hartford Health Care; Masonic Care; Wright Building; Elim Park; Carabetta Housing Management; Silver Pond Housing Management, Anthem Blue Cross; United Health Care; Care Partners; Well Care; Wallingford Town Hall; Wallingford Fire Department; Wallingford Housing Authority; Ct Food Share; SFMP, New Opportunities, Wallingford Public Library, Wallingford Health Department.

7/1/25	Support Group
7/8/25	Support Group
7/14/25	Wallingford Works for Housing

[illegible]

Month/Year: JULY 2025 STATISTIC REPORT
INFORMATION AND ASSISTANCE AND FOLLOW UP STATISTICS
SOCIAL WORKER REPORT

	I & A	FOLLOW UP CALLS	APPOINTMENTS OFFICE/OUTREACH	
1. ABUSE NEGLECT PROBLEMS	1		1	
2. ADULT DAY CARE	1		1	1
3. AGENCY ON AGING	2		2	2
4. HOMESHARE				
5. ASSISTED LIVING	5		5	2
6. BEHAVIORAL HEALTH/SUBS ABUSE/GAMBLING/HOARDING	23	7	23	
7. BENEFITS CHECKUP	2		2	
8. CHORE/HOMEMAKER/FRNDLYVISITOR	2		2	2
9. COMPANION/LIVE-IN				
10. CONGREGATE HOUSING				
11. CONGREGATE MEALS//ENP				
12. CONNPACE/CONNMAP				
13. CT HOMECARE PROGRAM	1		1	
14. MEMORY LANE	1		1	
15. ENERGY ASSISTANCE	2	2	1	1
16. FINANCIAL ASSISTANCE	3	3	1	1
17. FOOD PANTRY/OTHER	26	26	26	26
18. SNAP	1		1	
19. GERIATRIC ASSESSMENT PROG.				
20. HEALTH INSURANCE/DENTAL	3		3	
21. HOME REPAIR	2		2	2
22. HOUSING	16	6	16	4
23. HOME HEALTH	2		2	
24. INCOME TAX				
25. LEGAL	3	1	3	2
26. ADVANCED DIRECTIVES	1		1	
27. CONSERVATORSHIP	1		1	
28. POWER OF ATTORNEY	1	1		
29. LONG TERM CARE OMBUDSMAN				
30. MEALS ON WHEELS				
31. MEDICARE C	1	1	1	
32. MEDICARE PART D	1	1	1	
33. MEDICAID				
34. MEDICAL CARE/.DENTAL CARE	1	1	1	
35. MEDICARE A, B	1	1	1	
36. MEDICARE SAVINGS PROGRAM	10	5	6	
37. MEDIGAP	1	1	1	
38. STATEWIDE RESPITE PROGRAM				
39. SKILLED NURSING HOMES	1		1	
40. SOCIAL SECURITY				
41. STATE SUPPLEMENTAL/SSI				
42. SUPPORT GROUP/RESPITE	6	5	6	
43. TAX/RENT REBATE				
44. TRANSPORTATION	5		3	5
45. VETERAN'S PROGRAM	1		1	1
46. WEAP				
47. YOUTH & SOCIAL SERVICES	1	1	1	1
48. *HOME BOUND/WEELLNESS RESPONSE	2	2		2
49. NEW MEMBERSHIP/ *under 60 started 7/18/2025*	1/		1/	
50.COMMUNITY OUTREACH/ SOCIAL SERVICE VENDERS	4		4	4
51. COMPUTER SEVICES and MAIL	5		5	
TOTALS	144	65	130	55
TOTAL UNITS	394			

WALLINGFORD SENIOR CENTER
MEMORY LANE REPORT
JULY 2025

GENERAL STATISTICS:

Active Participants	18	Days of Service	22
Wallingford	16	Service units actual	140
Out of town	02	Service units' budget	231
New	00	Service units if full	330
Discharged	01	Average attendance	6.3
Referrals	04	Budgeted attendance	10.5
Assessments	02	Capacity attendance	15

Regular Meetings:

07/22/25 Staff Meeting

Other Meetings:

07/23/25 Meeting with potential new client for assessment
07/25/25 Meeting with potential new client for assessment
07/30/25 Visit at funeral home of SC member

Marketing Meetings

07/16/25 "New Haven Area Senior Networking" Meeting at Artis
 Senior Living of Branford attended by John Ardolino

Qualitative Statement:

We participated in many activities provided by the SC including the monthly birthday party with entertainment. We enjoyed Kareoke and attended an ice cream social to meet our new ED, Ann Zak. This has been a quiet month for us. A few of our regular clients have been away for the summer. Some have been discharged and some have been ill. We are hoping August will be better month as far as attendance. We have missed our clients. We hope the month of August is cooler and we can get outside for some programs.

Warm Regards,

Debbie Markiewicz,
Memory Lane Coordinator