



There's No Place Like Home

FY2011 Year in Review

Fiscal Year July 1, 2010 — June 30, 2011

Our Mission is to extend and enhance the independence and well being of older adults and build the capacity of family members, communities and organizations to care for them at home.

Our Vision is to be the premier provider of home and community based services recognized for quality, innovation, financial responsibility and a positive work environment.



There's No Place Like Home

This fiscal year has been one of our most successful since we began in 1980 with a grant from the Robert Wood Johnson Foundation. Fiscal year 2011 also represents a key turning point in home and community based services on two fronts. First is government support of home and community based services as an increasingly cost-effective way to help older adults age safely in the place they call home.

Secondly, research supports what we here at Senior Independence have known for many years — that most people prefer staying in their own homes. The 2010 AARP study found that 89 percent of adults 50 and over hoped to remain in their homes as they age, and the proportion was higher among 65+ and 75+ respondents.

We believe that Senior Independence is well positioned for the future given these current trends. As we move into the new fiscal year, we will continue to embrace the desires and needs of the older adults we serve by developing new programs and through collaborations with



Sally Huston
*Interim President,
Senior Independence*



David J. Kaasa
*President/CEO,
OPRS*

other not-for-profit providers across the country. Senior Independence's *iPartner* program, which was introduced three years ago, continues to grow and expand helping other not-for-profit providers move into the home and community based services arena. Our *iVillage* program helps local communities reduce service fragmentation and create healthy, integrated continuum communities enabling seniors to age-in-place with greater comfort and security.

We believe that home and community based services will play a significant role in the health care market over the next decades. As a not-for-profit organization, we look forward to assisting adults, families and the communities where they live in meeting the growing needs of the nation's aging population.

On the Cover

"I am hospice and palliative care"

2nd Place Photography, Adult Category,
National Hospice & Palliative Care
Organization (NHPCO) Creative Arts Contest

Photo by Daphne Massaro, volunteer
coordinator and adult day center director,
Senior Independence Akron/Canton Region.

Our Fiscal Year 2011 Strategic Objectives

- i* Optimize the development of Senior Independence to serve more people in more ways.
- i* Provide appropriate mix of high quality services in each market we serve.
- i* Invest in people and processes to achieve service excellence.
- i* Strengthen financial viability.

Home Health and Hospice

Home Health and Hospice allow people to maintain their quality of life while receiving personalized health care in the comfort of their own home.



Hospice Receives Deficiency-Free Survey

In August, Senior Independence Hospice received a deficiency-free Ohio Department of Health (ODH) survey in all seven regions. “This was our first survey since we began our hospice program four years ago,” remarked Sarah Grim, Senior Independence director of hospice. “The strength of our hospice program is in our regional teams and the compassionate care they continue to provide day in and day out for our hospice patients and their families.”

Hospice Care Grows

During fiscal year 2011 Senior Independence Hospice provided care for 815 patients and their families. The average daily census for hospice grew from 125 last year to 213 this fiscal year. “We are finding that more and more older adults and their families are turning to hospice for comfort and support,” added Grim.

Hospice Rotation “Opens Eyes”

Beginning in September 2010, Senior Independence Hospice of the Mahoning Valley Region and The Centers for Osteopathic Research and Education (CORE), an integrated statewide medical education consortium formed with Ohio University College of Medicine, began a palliative care rotation with fourth year medical students.

“Medical students spent one week shadowing all disciplines of our Hospice Care Team,” Karen Ambrose, executive director for the Mahoning Valley Region said. “Exposing them to hospice is the best education.” One student wrote in their journal: **“The compassion and support offered through this program is truly amazing and really puts the patient and family at ease.** In conclusion, hospice is a valuable resource that I feel is not utilized enough by physicians.”



Home Health Recognized Nationally



For the fourth consecutive year, Senior Independence has two regions who were named in the top 25% of home health providers in the country. This listing known as the HomeCare Elite, identifies the top 25% of agencies, ranked by analysis of performance

measures in quality outcomes, quality improvement and financial performance. The regions receiving this recognition for 2010 were the Southwest Region and the Central Ohio Region.

The 2010 AARP study found that 89% of adults aged 50 and over hoped to remain in their homes as they age, and the proportion was higher among 65+ and 75+ respondents.

Senior Independence receives the Dorland Health Silver Crown Award

The Silver Crown Awards seek to honor industry-leading organizations that provide exceptional services, products and information to the over-55 population.

Senior Independence Home Health was chosen based on achievements from August 2009 through October 2010, and leading efforts and programs that met the diverse needs of today's seniors. Winners were chosen for best-practice initiatives, quality, innovation and financial management. Dorland Health is the publisher of the *Case Management Resource Guide*, the *National Directory of Adult and Senior Services*, the *Senior Services Report*, and *Case In Point* magazine.

“As we move into health reform, Senior Independence is well-positioned to be the premier partner for hospitals looking to keep patients safely at home and out of the hospital as they recuperate from such conditions as CHF, COPD, and other chronic illnesses,” John Perkins, executive director Senior Independence Miami Valley Region said. “National and local recognitions for quality will be an important component in developing these relationships.”

30,000 Volunteer Hours

Senior Independence volunteer coordinators work with local communities recruiting qualified volunteers. These volunteers have a huge impact on our participants in the adult day centers, senior center attendees, and are an important part of the hospice care Senior Independence provides to patients and their families.

Adult Day Centers

Senior Independence is the largest not-for-profit provider of Adult Day Centers in Ohio, where participants may enjoy a variety of activities in a secure, safe and welcoming environment.



Engaging Seniors Using Technology

The adult day center employees in Cleveland and Akron are teaching participants the wonders of computer technology through a new program called “It’s Never Too Late (IN2L).” The IN2L system contains cognitive games that can be used for enjoyment as well as track the functioning levels of clients. The system also has physical games including bicycling and driving. Email and videos can be easily exchanged between the participant and his or her loved ones. This is particularly beneficial in maintaining relationships with grandchildren who welcome this form of communication.

“IN2L has given the staff a countless supply of tools to engage and stimulate our clients,” said Tina Witt, the Greater Cleveland adult day services director. “We have had family members come in to see it because their loved one, who normally doesn’t talk about their day, told them all about it the night before when they got home.”

In the Akron/Canton Region executive director Sheila Flannery worked with the OPRS Foundation to secure systems for the Akron and Canton adult day centers. “We cannot forget that our participants enjoy technology as much as we do, so it was important for us to pursue IN2L funding for our centers,” said Flannery.



Toledo Adult Day Center Moves Into New Home

The Toledo adult day center moved into its new home located within the J. Frank Troy Senior Center. The center was built in the heart of Toledo on land donated by the Warren AME Vision Empowerment Board, and will help in the community's efforts to expand services that benefit the area's older adults.

"We are thrilled to be part of the community-wide project that will increase the community's capacity to serve older adults in such an ideal location," said Toledo Senior Independence executive director Ann Heringhaus.

The Senior Independence adult day center officially opened its doors on September 16, 2011, during a ribbon-cutting ceremony.

"...connecting existing homes with social services. Many adults are able to live safely and comfortably in their own home but still need modest levels of assistance from social service agencies to maintain and improve their quality of life..."

— from the 2010 AARP study

Senior Centers

Senior Independence manages six senior centers in Ohio, five in Mahoning Valley and one in Southwest Ohio. These centers are a hub of activity providing seniors with camaraderie, hot lunches, card games, education, day trips and exercise. "This is a great way to engage seniors

who want to remain active and involved within their own communities," Angie Wyatt, executive director of the Southwest Region commented. Senior Independence manages these centers providing programs and personnel that engage the communities' older adult population.

Community Involvement

Senior Independence works with communities and organizations to help create cost-effective options for older adults who are able to safely and comfortably live in their own home.



LifeLong Communities

The Central Ohio Region held its second annual Senior Impact Series with community stakeholders coming together to learn and discuss how local cities become age-friendly and how to accommodate the needs of an aging population. Presenting on how New York is becoming an “age-friendly” city was Helen Hamlin who works with the International Federation on Aging, the United Nations, and the World Health Organization. Kathryn Lawler, with the Atlanta Regional Commission’s Area Agency on Aging (ARC), shared how ARC is working with energetic community partnerships, challenging assumptions, developing local strategies and forming the region’s response to its growing, changing population.

With more than 200 community stakeholders present, Linda Artis, executive director for the Central Ohio Region, presented the Senior Impact Award to Dave Paul, a convener of the Central Ohio Senior Roundtable. **“Dave’s service has been the glue that holds together many efforts focused on seniors in the Greater Columbus area,”** said Linda Artis.

SENIOR *i*MPACT SERIES

Charitable Giving

A total of \$573,796 was raised in support of Senior Independence in fiscal year 2011 from individuals, corporations, foundations and government agencies to expand important programming and projects.

New Project Supported by Community Partners

Senior Independence in the Akron/Canton Region received two generous grants for “It’s Never 2 Late (IN2L)” systems that will enhance the program offerings at its adult day centers. The Lehner Family Foundation Trust gave a grant of \$5,000 for an IN2L to be placed at the Akron site, and The Aultman Foundation granted \$7,000 to be used towards the purchase of an IN2L at the Canton location.

The IN2L is a computer system designed for elder users who may never have used a computer. The system encourages interaction with staff, family and other clients, therefore decreasing feelings of loneliness. The games, Internet access, and communication methods that the system provides reduces feelings of helplessness and boredom.

Government Grants Meet Many Needs

Senior Independence regions receive several types of government grants for an array of home and community based services. Government support includes Title III,

Title XX, Alzheimer’s Respite, United Way and Ohio Department of Education Child and Adult Care Food Program (CACFP) funding.

Hospice Fundraising Grows

With the second year of Senior Independence’s hospice fundraising program complete, donations for this initiative are continuing to grow. Donations to hospice services reached over \$43,400, which was more than 25 percent above budgeted projections. The number of donors rose significantly, increasing from 391 in fiscal year 2010 to 555 in fiscal year 2011.

New Program Receives Support

Senior Independence of the Miami Valley Region received a generous grant of \$18,564 from the DMH-Dayton Fund of The Dayton Foundation, which is providing funds to launch two *i*Villages in the Miami Valley. *i*Villages are lifelong communities with customized service plans that help keep seniors at home, that result from strong collaborations between Senior Independence, condo associations, senior living communities and local community governments.

Friends and Family Fundraising

Fiscal year 2011 saw the launch of the Friends and Family Fundraising program. This program provides guidance for individuals or groups who wish to host their own fundraising events benefiting Senior Independence Hospice. Examples include spaghetti dinners, lemonade stands, race teams, golf outings and much more.

Make it Happen®

Support is increasing for Make it Happen®, a program that brings special moments of joy and meaning to those nearing the end of their lives by fulfilling their life-enhancing wishes. Each moment is unique and personal, and provides family members with lasting memories.

iPartner

The Senior Independence affiliate program for home and community based services is a national effort to serve more people in more ways by partnering with other not-for-profit organizations.

Westminster Canterbury of Lynchburg

(l-r) Vicki Pickeral, Kelly Riley, Sally Huston and Tammy Layne



iPartner Affiliate Program

The *iPartner* program is a national effort by Senior Independence to serve more people in more ways by partnering with other not-for-profit organizations. Each *iPartner* owns and operates the home and community based services, with Senior Independence providing ongoing clinical, financial, information systems, regulatory, admissions and operations support.

Kendal Northern Ohio & Westminster Canterbury of Lynchburg Become Certified Home Health Agencies

One year after signing on as *iPartners*, Kendal Northern Ohio and Westminster Canterbury of Lynchburg are now Medicare-certified home health agencies providing home health services in their regions.

“We thank each one of you for your mentoring and assistance that helped make this significant

milestone possible,” stated Stacy Terrell, chief health services officer for Kendal Northern Ohio, on the announcement of the accreditation.

McGregor Assumes Cuyahoga County PACE Program

On September 1, 2010, The McGregor Group, Senior Independence’s third *iPartner*, assumed the Greater Cleveland PACE (Program of All Inclusive Care for the Elderly) in collaboration with University Hospitals and Senior Independence. “Home and community based services are critical to the growing number of frail and impoverished seniors in Greater Cleveland whom we serve as our highest priority,” said Rob Hilton, president and chief executive officer of McGregor. “PACE is extraordinarily important because it offers high-quality care while making the most efficient use of scarce government funding.”

Senior Independence of Southwestern Pennsylvania

(l-r) Vanessa Stiltner, Jennifer Kablach,
Geoff Gehring and Ashley Poleneti



Senior Independence Welcomes Newest *i*Partner: Redstone Presbyterian SeniorCare

Redstone Presbyterian SeniorCare became the fourth *i*Partner January 2011 during a signing ceremony in Columbus, Ohio. Senior Independence of Southwestern Pennsylvania will initially offer home care services as they await home health certification later this year. Geoff Gehring, executive director for Senior Independence of

Southwestern Pennsylvania said, “Today, seniors are looking to stay in their own homes longer than perhaps their parents were able. Senior Independence is another option for individuals who need extra help yet aren’t necessarily ready to move to an assisted living facility.”

“Upon hearing about Senior Independence and the *i*Partner opportunity during a LeadingAge (formerly AAHSA) annual conference, our leadership began to assess the business advantages of a partnership after many years of internal strategic discussions.

“We certainly did not want a business-in-a-box approach that offered no practical or true life experience, which could financially expose our organization and damage our reputation. What we discovered is Senior Independence, through its many years of direct service to older adults, had developed everything we needed.”

— John Dickson, President and CEO of Redstone Presbyterian SeniorCare



Financial Performance

This past year represents Senior Independence's most successful financial year in more than 30 years of serving seniors.

Fiscal Year 2011 Accomplishments

- i* Record people served of more than 90,000, and record Home Health episode volume & revenue levels
- i* Two newly-attained provider numbers for Medicare-certified *i*Partners (Virginia & Northern Ohio)
- i* 70% volume growth in hospice clients served versus prior year
- i* Achieved a \$2.7 million positive bottom line due to volume growth and cost control
- i* Tightened Accounts Receivable to 48.3 days beating prior year and budget
- i* Exceeded cash forecasts by more than \$2.6 million

Summary Financial Results

Statement of Revenue and Expense

Fiscal Year Ended June 30, 2011 (*\$000s omitted*)

Gross Revenue	\$ 44,662
Charity/Contractuals	(1,568)
Net Revenue	\$ 43,094
Expenses	<u>40,399</u>
Excess of Revenues Over Expenses	<u>\$ 2,695</u>

Key Financial Indicators

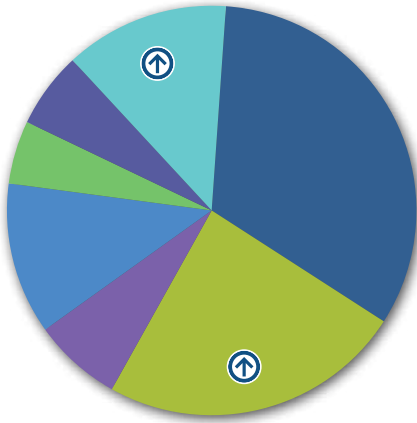
# of PPS Episodes	6,461
Reimbursement per PPS Episode	\$3,196
Accounts Receivable	\$6,043,272
Days in Accounts Receivable	48.3
% of Accounts Receivable over 90 Days	18.1%
Cash Receipts	\$42,249,000

“Senior Independence is a not-for-profit organization, which in my mind is the best of both worlds,” said Joe Belvedere, vice president of finance. “Our organization has all of the compassion and quality that one would expect from a not-for-profit, and all of the cost-consciousness, efficiency, and drive for productivity that one would expect from a for-profit organization.” Throughout the organization, both components are ingrained in the culture.

Fiscal year 2011 was a **record financial year** for Senior Independence. Home health and hospice from core operations were both at record levels. The top line of \$45 million was a new record. The bottom line of \$2.7 million and bottom-line margin of 6.3% (after the absorption of over \$2.6 million in social accountability work), were both records. As a

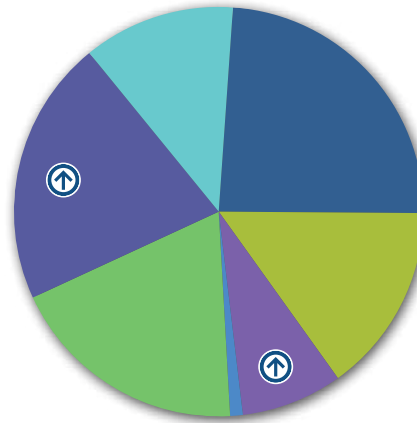
result, record levels of cash receipts helped to fund operations, new initiatives, and investments in future automation. In addition, more dollars this year went toward “Make it Happen[®]” events which greatly improve the lives of hospice clients and families.

In a climate of continuing reimbursement pressures and economic restraints, Senior Independence strives to stay ahead of the curve by making processes as efficient as possible — **inventing our future rather than having it forced upon us**. We drive over 2.5 million miles per year, so we focus on smart scheduling and transportation modes. We strive for strong clinical productivity utilization. And, thanks to our core growth, and the growth of our *i*Partner program, we constantly look for economies of scale, leverage, and best practice sharing.



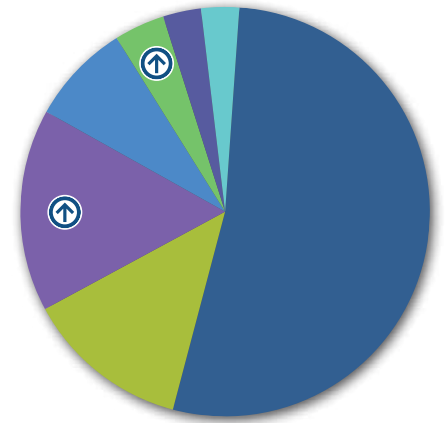
Gross Revenues by Payor

Medicare Home Health	33%
Medicare Hospice	24%
Passport	7%
Private	12%
Local Levy	5%
Medicaid	6%
Private Insurance	13%



Payor Sources for Units of Service

Private	24%
Medicare Home Health	15%
Medicare Hospice	8%
Medicaid	1%
Passport	19%
Private Insurance	21%
Local Levy	12%



Operating Expenses

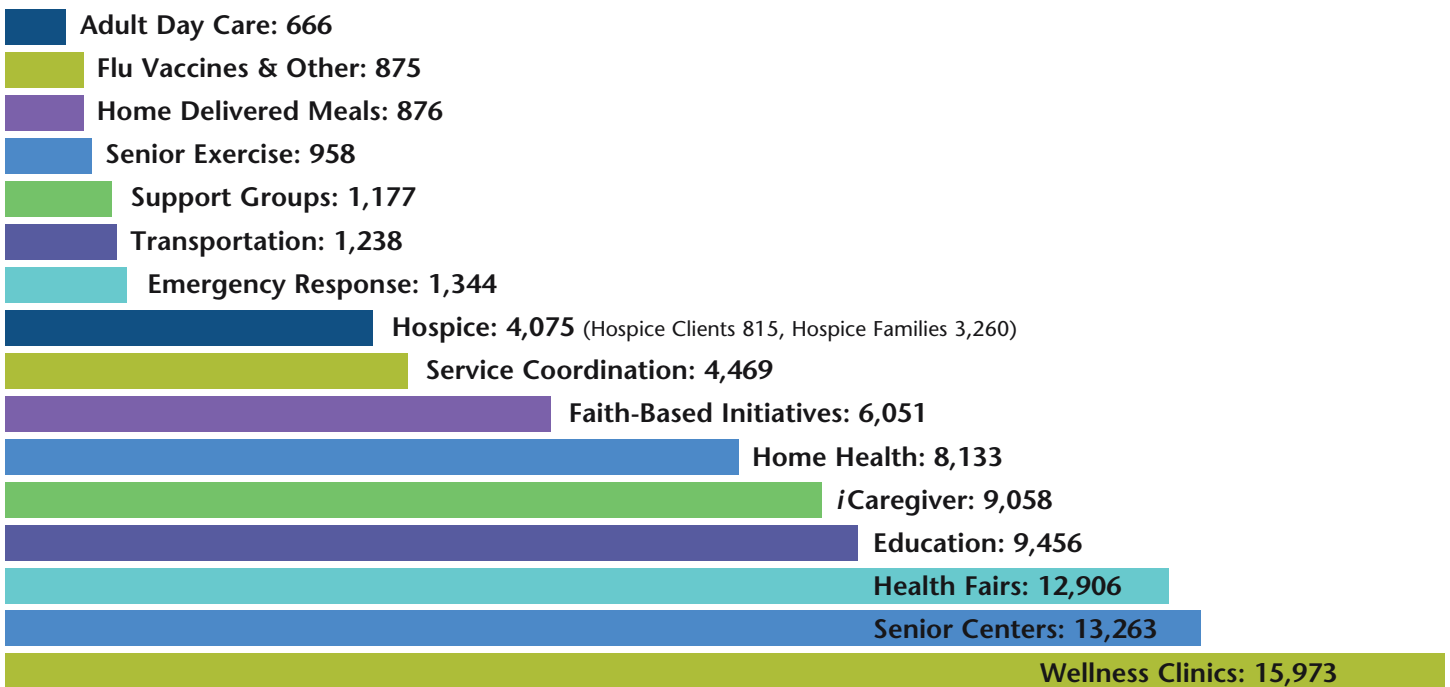
Salaries	53%
Benefits	13%
Contract Services	16%
Food & Other	8%
Care Supplies	4%
Travel	3%
Rent & Utilities	3%

⬆️ Fastest growing segment

Units of Service



90,518 Total People Served in Fiscal Year 2011



Locations and Services

Since 1980, Senior Independence has grown from a few clients to serving more than 90,000 seniors throughout Ohio, Virginia and Pennsylvania.



Board of Directors

Senior Independence would like to thank the members of the board for their service:

John Peterson, *Board Chair*
Amy Roscoe, *Board Vice Chair*
Dr. Lori Holzworth-Brohm
Rod Harrison
Christopher Jenkins
Dave Kaasa
Gordon Kendall
Dick Krieger
Dan Lane

Kass Mahdi
Linda Pape
Barbara Riley
Debi Sampsel
Rev. Louise Seipel
Amy Shore
Faith Williams

Senior Independence Services

Adult Day Centers
Adult Education
Caregiver Services
Home Care
Home Delivered Meals
Home Health Care
Hospice
*i*Caregiver.org®
*i*Villages
LifeLine®
Make it Happen®

Medication Management
Nurse Practitioner
PACE (*Program of All-Inclusive Care for the Elderly*)
Palliative Care
Respecting Choices®
Senior Centers
Service Coordination
Support Groups
Wellness Clinics



Helping older adults live independently in their homes for longer periods of time... "for many aging Americans, this is their number one wish."

— Larry Minnix, president and CEO, LeadingAge (formerly AAHSA)

Senior Independence and iPartner Locations

Ohio Locations

Akron/Canton Region

330.873.3468

Sheila Flannery, *Executive Director*
1815 W. Market Street
Akron, Ohio 44313

Central Ohio Region

614.433.0031

Linda Artis, *Executive Director*
6555 Busch Boulevard
Columbus, Ohio 43229

Greater Cleveland Region

440.953.1256

Eileen Yates, *Executive Director*
38721 Mentor Avenue
Willoughby, Ohio 44094

Mahoning Valley Region

330.533.4350

Karen Ambrose, *Executive Director*
6715 Tippecanoe Road
Canfield, Ohio 44406

Miami Valley Region

937.415.5666

John Perkins, *Executive Director*
6520 Poe Avenue
Dayton, Ohio 45414

Southwest Ohio Region

513.681.8174

Angie Wyatt, *Executive Director*
9600 Colerain Avenue
Cincinnati, Ohio 45251

Greater Toledo Region

419.865.1499

Ann Heringhaus, *Executive Director*
5810 Southwyck Boulevard
Toledo, Ohio 43614

iPartner Locations in Ohio

Kendal Northern Ohio

440.731.8801

Stacy Terrell, *Chief Health Services Officer*
200 Asbury Lane
Elyria, Ohio 44035

McGregor PACE

Tangi McCoy, *CEO*

East Side - Cleveland Heights

216.791.3580

2373 Euclid Heights Boulevard
Cleveland Heights, Ohio 44106

McGregor PACE

West Side - Cleveland

216.957.2300

4229 Pearl Road
Cleveland, Ohio 44109

iPartner Locations in Pennsylvania

Senior Independence

Southwestern Pennsylvania

724.864.7388

Geoff Gehring, *Executive Director*
12921 Redstone Drive
North Huntingdon, Pennsylvania 15642

iPartner Locations in Virginia

Westminster Canterbury-Lynchburg

434.386.3800

Kelly Riley, *Administrator*
2025 Tate Springs Road
Lynchburg, Virginia 24501



Senior Independence Home and Community Based Services

Senior Independence is a wholly owned subsidiary of Ohio Presbyterian Retirement Services (OPRS), the largest and most experienced not-for-profit provider of continuing care retirement communities and services in Ohio.

www.seniorindependence.org

www.icaregiver.org