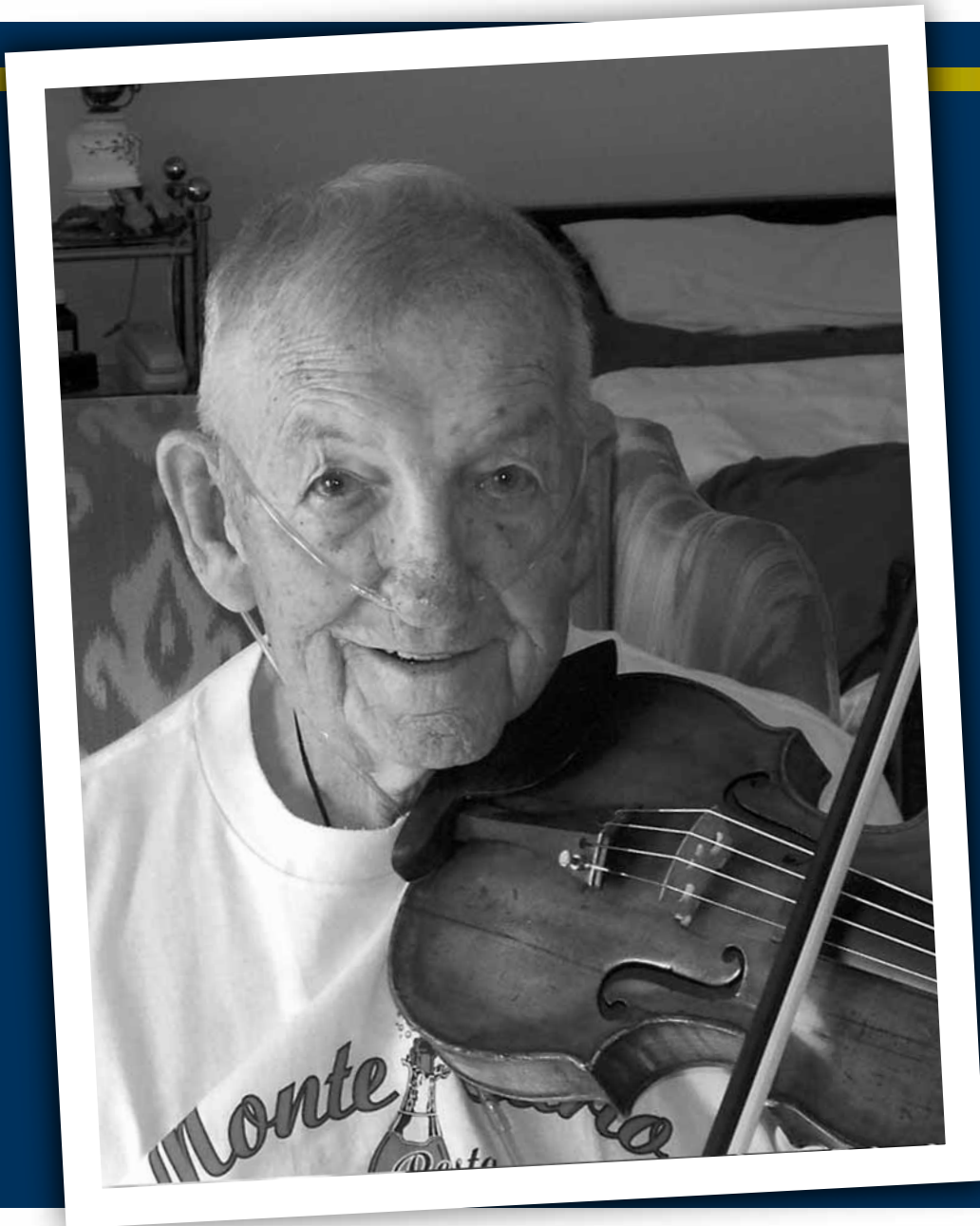


SENIOR INDEPENDENCE[®]
OHIO PRESBYTERIAN RETIREMENT SERVICES



OHIO PRESBYTERIAN
RETIREMENT SERVICES

FY2009 Year in Review

Fiscal Year July 1, 2008 – June 30, 2009

Caring for Families with
Kindness and Trust



Our Mission

is to provide older adults with caring and quality services toward the enhancement of physical, mental and spiritual well-being consistent with the Christian Gospel.

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.

Senior Independence® Services

- Adult Day Centers
- Adult Education
- Caregiver Services
- Flu Vaccines
- Home Care
- Home Delivered Meals
- Home Health Care
- Hospice
- *icaregiver*.org
- Lifeline
- *Make it Happen*®
- Medication Dispensers
- Medicine Management
- Nurse Practitioner
- *Respecting Choices*®
- Senior Centers
- Service Coordination
- Support Groups
- Wellness Clinics

“This is gonna make me famous.”

These words sound like something that a teenager might say, or an American Idol finalist might be thinking, yet they were spoken by Mr. Al Hazucha, the gentleman who's featured on the front of our year in review. He was right, his photograph appeared on the cover of the *National Hospice and Palliative Care Newslite* newsletter in June 2009 and made him somewhat of a rock star within Senior Independence.

We love to share stories about our clients because our clients and their families are the real heart of Senior Independence. Sometimes in today's society we forget that these seniors were once children, young parents, working men and women, soldiers, and people with dreams. When we listen to clients share their stories we understand who they really are and what they need. It is our hope that the stories we share within these pages will illustrate how Senior Independence cares for older adults and caregivers with kindness and trust.

As we look over this past year, we are reminded that the financial stewardship we practice today will allow us to care for a greater number of older adults and caregivers tomorrow. We look forward to sharing their stories as well.



Nancy King, EDM
Senior Independence
Executive Vice President/COO



Dave Kaasa
OPRS
President/CEO

Fiscal Year 2009 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.

“Thank you for the shawl and prayers for my husband. When the hospice nurse gave it to him he smiled, and we do not see that too often anymore. Keep up the good work.”



Hospice Expansion Complete

This fiscal year all seven Senior Independence locations throughout Ohio began providing hospice services, completing the expansion that began two years ago.

Improving Lives

Many people associate hospice with end of life care for those suffering from terminal cancer. This is not the case for many of Senior Independence clients who are suffering from the affects of chronic illnesses such as Alzheimer’s and heart disease. Many times these clients do not have the support of a healthy spouse and are dependent on assistance from their children, volunteers and neighbors. “We have seen improvement in many of our hospice clients’ attitudes and general well-being once we initiate hospice services,” says Sarah Grim, MSW, LISW, corporate director of program services.

“This was one of the reasons we wanted to provide hospice. We felt that we better understood the needs and situations of most older adults.”

Measuring Success – The Old Fashioned Way

“We want our hospice clients and families to recommend Senior Independence to others,” says Grim. “For us to achieve this we really focus on 100% satisfaction from our families.” Although Senior Independence has always conducted family satisfaction surveys, in the next several years a more formal data collection called Quality Assessment and Performance (QAPI) will begin to take shape. QAPI measures family satisfaction and assesses outcomes to see whether good results are being achieved. In the next five years, it is anticipated that Medicare will include QAPI under its conditions of participation. “We have always assessed our quality of service and sought to improve our performance in areas that

Expressing Thanks

Hi Kristin and Hospice Caregivers All,

First of all, I truly got tears in my eyes when I read your email. How can I adequately express the thanks for the time, attention, skill and most of all, the pure love you put into your caring work? I can testify that our mother seems clearer and happier — all due to the addition of your hospice services. In everyday phone conversations, my mom is easier to understand and sounds more like her “old self” than she has in recent months. A deep thanks for all you are doing to improve this dire situation grappling with her Alzheimer’s disease. My dad also has expressed how nice your team is when they visit.

I must also deeply thank Julie Maynard for suggesting that you could provide our mother with a new and improved wheelchair that included leg supports. Mom’s right arm, right hand, and both feet were starting to curve inward. I noticed that she had straightened out a bit in the legs after a day or so of the leg support. Julie so kindly arranged for the wheelchair to be delivered the very same day, just in time for her birthday dinner so she was more comfortable sitting for a long period of time. I have never seen such responsiveness in today’s modern medical environment except in high-end concierge medical practices. Truly remarkable and we are very grateful!

I can’t tell you how nice it is to have the communication from your team. It makes living 3,000 miles away a bit easier knowing they have truly kind and caring RNs looking in on them! Thank you ever so much.

With warmest wishes and gratitude, Jill Fugaro



Left: Chris and Otis Hodge, hospice volunteers, spend their free time visiting patients. **Right:** Kristin Poe, social worker Central Ohio hospice, greets Jill Fugaro’s Mother on move-in day at Westminster-Thurber Community.

were low. Now, we will have a national database to compare ourselves to,” shares Sally Huston, MSN, vice president of clinical operations.

The Gift of Music

The picture on this year’s cover won third prize in the photography contest sponsored by the National Hospice and Palliative Care Organization (NHPCO). Mr. Al Hazucha was a hospice patient who enjoyed listening and playing classical music. His picture, taken by Sue Brookins, administrator for the Central Ohio Region, graced the cover of the June 2009 NHPCO newsletter.

Hospice and Palliative Care Certification

Dr. Jeffrey Milks, medical director for Senior Independence, received his certification in hospice and palliative care.

End of Life Nursing Education Consortium (ELNEC) Project

The ELNEC core curriculum was developed to enhance palliative care in nursing by providing end-of-life education for practicing nurses. Curriculum for additional staff training in conjunction with ELNEC was provided this year on the web for Senior Independence nurses and social workers. In addition, ELNEC programs were presented throughout the state of Ohio and 320 CEU certificates were awarded.

Seasons of Caregiving

Central Ohio had 54 professionals attend a three-hour CEU program covering topics promoting positive self-care for caregivers and identifying caregiver issues for hospice patients and their families.

"Just because
I'm 77 doesn't
mean I still
don't have
dreams."

— John Glenn,
*Senator and
Astronaut*



Make *it* Happen[®] Makes a Difference

Sometimes it is the little things that make a difference, and the employees of Senior Independence make the little things happen for our clients. Our employees show how much they care by taking the time and making the effort to go the extra mile for our clients. Employees have done things they never thought they were capable of, like writing the Queen of England on behalf of a client who was born in England, and getting a reply from her lady-in-waiting.

Strong relationships are the foundation of this program, including those between our clients, the staff, volunteers and the community. It starts with a volunteer or staff member recognizing what a client needs or wants. Then, they work with the community to make it happen.

For those who make it happen, it is a learning experience that brings many rewards — a feeling of accomplishment, recognition and happiness. "To think that this is only about the clients would be misleading. This brings a real sense of satisfaction to our employees and volunteers, as well as our clients," Nancy King, EDM, Senior Independence executive vice president and chief operating officer, reminds us.

Here are just a few of the many Make *it* Happen moments this past year:

All Cora wanted for her 90th birthday was a luau. So, the Mahoning Valley staff 'made it happen,' inviting friends and family to celebrate Cora's 90th birthday with a luau. She even learned to do the hula.

The Porters needed a night out at their favorite restaurant so the Akron team arranged for their favorite restaurant to bring the dinner to them. Mr. and Mrs. Porter were treated to a romantic

A Circle of Kindness

Mr. Greenlee did excellent work, when he was able. His woodworking projects were both inspiring and beautiful. He was also very determined and wanted to stay at home with his wife. In order to help Mr. Greenlee leave behind a little bit of himself, Carl Gibbard, a hospice volunteer, began the long process of photographing and cataloging all of Mr. Greenlee's woodwork so that his family would have a keepsake of their father.

Mr. Greenlee passed away before Carl finished cataloging all of his woodwork, and yet Carl kept working on it because he knew how important this was for Mr. Greenlee. Several months after Mr. Greenlee passed, Carl was able to present the family with a beautiful scrapbook of all of Mr. Greenlee's woodwork — a keepsake the family will always cherish.

This 'one act of kindness' prompted another. Mr. Greenlee's daughter, Sherri, who was so touched by Carl's thoughtfulness and dedication to her father, decided she would also become a Senior Independence volunteer.

Sherri knew how much the scrapbook meant to both her and her family, so when another hospice patient, Leah McKnight, mentioned that her favorite star was Bill Cosby, Sherri set to work on a plan. She emailed Bill Cosby's agent with a request for an autographed photo and a phone call for Mrs. McKnight from the star.

Sherri contacted the Senior Independence team to share what she had done. "I can't believe I am doing this! Thanks for giving me something exciting and fun to do. This is really what I needed," wrote Sherri. "I was thinking about why I like volunteering for Senior Independence – you and Carla make me feel so special. I know people appreciate what I do, but you really make what I do feel like I am making a difference."

Bill Cosby called Mrs. McKnight and spoke with her for over 30 minutes. Sherri really did make a difference, just like Carl did when he presented the scrapbook of her father's woodwork.

Thank you Carl and Sherri for making a difference.



dinner accompanied by live music in their retirement community home.

Amelia Marcus loves begonias and gardening. She enjoyed this great time of reminiscing and companionship as she, her nurse and social worker designed and planted flowerbeds surrounding her Akron home.

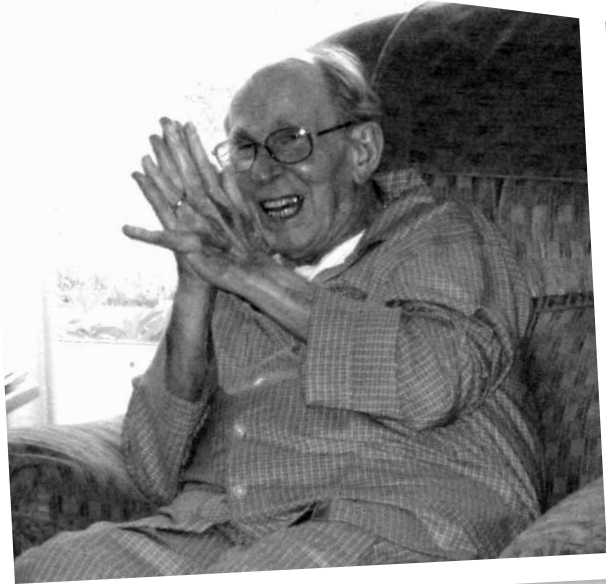
Hospice social worker, Sara Beth Keiser-Mindrup, and her team arranged for a barbershop quartet to come and sing to hospice patient, Homer, and his wife. Homer, who has dementia and Parkinson's disease, joyfully sang, and danced along!

Opposite Page

Top Left: Surprise, Cora! You're having a luau for your birthday. **Bottom Left:** Amelia proudly stands in front of her newly planted flowerbeds.

This Page

Top Right: Mr. Greenlee receives a kiss from his daughter, Sherri, on her wedding day. **Bottom Right:** Homer sings along to some of his favorite songs.



SENIOR *i*NDPENDENCE. HOME HEALTH

“Just wanted you to know that everything went well! Our family is very grateful to you and the Miami Valley Office for stepping up to the plate and handling things so well! Very professional and GREATLY appreciated!”

This Page: The nurses of Team Toledo are recognized during nurses week. Back row from left to right: Mary, Lori, Darlene, Tammy, Beth and Pat; front row from left to right: Debra, Sue and Jill. **Right:** The 8th grade class at Immaculate Conception with their devotional cards.



What is the percentage of Senior Independence clients who remain home after receiving home health care?

69%

National Average 67%, CMS Report January 2008–December 2008

Central Ohio, Mahoning Valley and Southwest Regions Ranked Among the Top 25% of Home Health Providers in the Country

For the second consecutive year, the Central Ohio and Southwest Regions were among the top 25% of the nation's home health agencies. Joining their ranks this year was the Mahoning Valley Region. All three were also included in the HomeCare Elite, a compilation of the most successful Medicare certified home health care providers in the United States. This annual review identifies the top 25 percent of agencies, ranked by an analysis of performance measures in quality outcomes, quality improvement and financial performance. “This is a big deal for us and our clients. It means that people can come to Senior Independence and get better,” announces Sally Huston, MSN, vice president of clinical operations.

Regions Receive Perfect Surveys

The Toledo Region received its third perfect Ohio Department of Health Survey and Miami Valley received its second perfect survey this fiscal year. Ann Heringhaus, executive director of the Senior Independence Toledo Region explains, “Our perfect survey reaffirms the physician's assertion that they are referring their patients to an agency that provides the highest quality of care.”

Training Leaders for the Future

The Leadership Education Development (LED) program is all about training future leaders. It's a 14-month corporate training program for first line supervisors with no previous management experience. Each supervisor has a mentor, usually the home health administrator, on-line coursework and classroom instruction. Ten clinical team leaders and seven administrators participated in this first year of the program.



Lifelong Lessons

When Senior Independence of Greater Cleveland was asked to talk with the 8th grade class at Immaculate Conception about our mission to serve older adults, no one expected the teens to become so enthralled. Shortly afterwards 100 devotional cards were sent to Senior Independence's clients as a thank you. The devotionals are inspirational and comforting to not only the clients but their families as well.

Shortly afterwards, the Senior Independence Cleveland team arranged a pizza party with the class as a way to say thank you for bringing joy to clients and their families. At the end of the party, each child stood up at their desk and read about what the opportunity meant to them. Here are some of the things they said:

Matt wrote, "I hope that our devotionals have helped people remember that there are people out there thinking about them and praying for them."

Allison wrote, "I really took a lot of pride and joy in helping make hospice devotionals. It made me feel a lot better about myself to know that I was making others feel better."

Continuing Education

Regional CEU training classes were conducted on infection control best practices for home health and hospice with 126 Senior Independence clinicians, nurses and therapists attending from across the state. This year Sarah Grim, MSW, LISW and Senior Independence director of program services, teamed up with Lake Vista in Cortland, Ohio, to present "Ethics for Healthcare Professionals," a 3-hour CEU program. This program was opened to community nurses and social workers where 66 professionals attended.

Corporate Support Grows

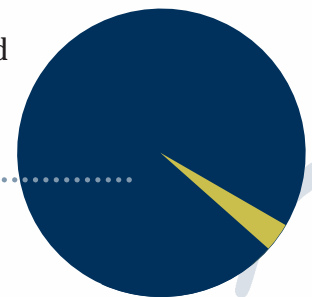
This year Senior Independence provided additional support for the OASIS process by centralizing its electronic medical records at the Columbus, Ohio corporate office. OASIS is the Outcome and Assessment Information Set, a national data set required for continual Medicare certification. By

centralizing this process, Senior Independence gains an additional layer of quality assurance for compliance with Medicare regulations. "We have done this to assure growth support for the future and to meet our high quality assurance standards," adds Heather Elsner, corporate health information director.

Client and Family Satisfaction Survey

97% of the respondents said they would recommend Senior Independence to others.

Would recommend
to others 97%



SENIOR INDEPENDENCE. ADULT DAY SERVICES

Why Participants of Senior Independence Adult Day Centers Are Thankful...

"If it wasn't for people like you; I would be sitting at home alone with my cat."

"Here I get to be with everyone."

"I am thankful for my health and getting along pretty well in spite of things."



Adult Day Centers Expand

The Southwest Region gained its fifth center with the addition of Edenvue, the only adult day center serving the Eden Park area. When Joan Punch-Fleming, executive director of the Southwest Region, heard that Edenvue was going to close its doors she worked with the owners and the local area agency on aging to bring this center under Senior Independence management. "We were able to keep the center open throughout this transition, which is a vital service to these families," Punch-Fleming said.

The Painesville adult day center, which broke ground last fiscal year, is now operating five days a week and received Veterans' Administration and PASSPORT approval, paving the way for more clients to be served. The Orange adult day center and the Willoughby center continue to have waiting lists with anticipated expansion coming next fiscal year.



Business of the Year

In May, the Franklin adult day center at the Conover Center was awarded Business of the Year by the Franklin Area Chamber of Commerce for its commitment to helping seniors and the families who care for them.

In July the center also honored its 10th anniversary with a day of celebrations and an open house for the community.

More Than a "Wii" Bit Generous

In fall of 2007, Max Hess of Bath, Ohio, started looking for a social service project to do for his upcoming Bar Mitzvah. (American synagogues often require that a child perform a charitable project as part of the preparation for their Bar or Bat Mitzvah, the coming-of-age ritual that takes place when a Jewish boy or girl turns 13. Such projects are meant to help teach the child the concept of "Tzedekah" or charity, by actively taking part in it.)

Max wanted to focus on something he knew and liked, so he suggested raising money to buy a Wii game system for a senior center. He heard that senior centers were starting to embrace the Wii, because its interactive sports games helped keep seniors mentally sharp and physically fit. His parents liked that idea, but felt that he should also do some hands-on work himself and suggested that for part of the project, he should help teach the staff and residents how to use the Wii. Before Max could start raising money, he needed to find a senior center recipient. Some searching led to the Senior Independence adult day center in West Akron. The staff was very receptive to Max and his family and Senior Independence adult day participants were very eager to work with them. Max started doing chores to raise money and collecting donations from friends, neighbors and synagogue members.

In July, Max visited the center with his own Wii to give a demonstration to the participants, and both he and the Wii were very well received. The participants were excited and eager to have their own system. The day after his Bar Mitzvah, Max obtained the last few donations, giving him enough to purchase the Wii and an additional controller for the center.



This Page

Above: Max helps Dorothy Lazado operate her Wii controller.

Left: A client of the Central Ohio ADC, Kayzon Phillips, stands with "The Friendship Quilt" at the AOPHA art competition.

Opposite Page

Top: Franklin's adult day center staff and clients. **Bottom:** Receiving the Franklin Business of the Year award are: seated left to right, Cheryl Anglin, RN, center coordinator and Carlene Silcox, activity assistant. Standing from left to right are Harriet and Tom Foley, Conover Center Board member with Ann Munafo, Southwest Region director of business development.



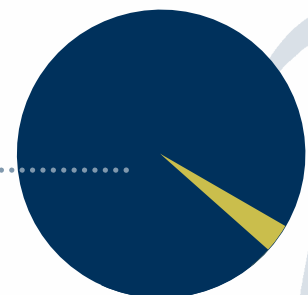
The 'Friendship Quilt'

The Central Ohio adult day center won first place in the regional AOPHA (The Advocate of Not-For-Profit Services for Older Ohioans) art competition with "The Friendship Quilt." The participants designed the quilt, chose the colors, the fabrics, and the idea. The clients traced their hands and cut them out of a fabric that best represented their personalities. Every client enrolled in the Columbus center since March 2008 was included in the quilt.

Client and Family Satisfaction Survey

98% of the respondents said they would recommend Senior Independence adult day centers to others.

Would recommend to others 98%



SENIOR INDEPENDENCE. CIVIC ENGAGEMENT

"I chose to volunteer at Senior Independence to have a 'purpose' — being retired I needed to feel useful. In doing this, I am able to help an organization that is extremely vital in our area."



Above: Left to right: David Feck, Clara Barker, Rick Dale (holding the plaque) and Sandy Harris; nominees of the annual Triumph Award. **Top Right:** Ohio State Representative Brian Williams witnesses a home health visit in Akron, Ohio. **Middle Right:** Karen Ambrose, executive director of Senior Independence Mahoning Valley, speaks outside the Mahoning County Courthouse about the prevention of elder abuse. **Far Right:** Ohio Department of Aging Director, Barbara Riley, presented information regarding the escalating needs of Ohio seniors; she is standing with Linda Artis, executive director for Senior Independence Central Ohio.

Celebrating Contributions of Others

Volunteers have always been an essential part of Senior Independence. This year's recognition events were held across the state of Ohio and included hospices and senior centers.

The annual Triumph Award is for volunteers who "go the extra mile." They are nominated for their volunteer efforts by anyone associated with the Anderson Senior Center. The nominations are judged solely on the nomination form, by outside individuals who are not aware of the center activities. Rick Dale was this year's winner and is pictured holding the Triumph Award.

Advocating for Seniors

According to the latest AARP report, "Fixing to Stay," 80 percent of seniors prefer to live at home in their later years, rather than move. These statistics continue to support what Senior Independence has long advocated.

This fiscal year ushered in much debate on health reform and the need for balanced budgets. Senior Independence executive director of the Central Ohio Region, Linda Artis, was asked to testify on health reform in front of the Ohio House of Representatives. Artis presented testimony for AOPHA (The Advocate of Not-for-Profit Services for Older Ohioans) in support of PACE (Program of All-Inclusive Care for the Elderly).

Artis' testimony focused on the need for expansion of the PACE program in Ohio. This comprehensive service package permits seniors to continue living at home.

It Takes an iVillage

In Russia, a rural town near Sidney, Ohio, townsfolk like to stay close to home. In fact, many Russia seniors have made this so abundantly clear to Jon Hefner, a local real estate developer, that he has decided to do something about it. Hefner began building a neighborhood with homes that allow seniors to age in place, instead of having to move out of the Russia community. An easily accessible building to be located within the neighborhood, will provide wellness activities, educational opportunities and health screenings for the residents.

On one particular day, 21 senior ladies were forming teams for the Chili Cook-Off and listening to the Russia Local School Band Boosters, before participating in an exercise class provided by Senior Independence. "It is a partnership that brings services closer to those who need it," says John Perkins, executive director of the Miami Valley Region. "This partnership provides quality care and services and cost savings to the seniors of Russia." It also helps the town of Russia keep a growing and vibrant senior population active in their community.



Additional testimony on home care and hospice was given by Artis who related the benefits these vital services provide to individuals and their families. "My goal was to give a better understanding of what a continuum of home and community based services looks like and how it positively impacts individuals," Artis explained.

Why did Sheila Flannery, executive director of the Akron/Canton Region, decide to become a regional director for AOPHA? "To develop relationships with people that we wouldn't normally have," explains Flannery. "I met Ohio Representative Brian Williams at an annual legislature event and asked him when he was going to visit us. He was able to come to Akron and see PASSPORT clients in our adult day center and a Medicaid waiver patient in Rockynol's assisted living apartments. He really had little exposure to adult day care and was very impressed with what we were doing and how many PASSPORT clients were in need."

Senior Independence Volunteer Hours

Senior Centers

9,965 hours

Hospice

1,183 hours

Adult Day Centers

754 hours

In May, Nancy King, EDM, Senior Independence, executive vice president, was asked to join a panel of discussants on Long-Term Care Models for the Health Reform conference sponsored by The Scan Foundation in Washington D.C. The Scan Foundation is one of the nation's largest foundations dedicated to the needs of the elderly.

SENIOR INDEPENDENCE[®]

FOUNDATION SUPPORT

“We support Senior Independence in their efforts to enhance communication between providers through education...all to better serve seniors efficiently and effectively.”

— Patricia Cash, *Senior Vice President, Client and Community Relations Director, Central Ohio Region, National City, now a part of PNC*

33% Increase in Giving

Despite challenges and difficult economic times, Senior Independence fundraising saw growth of 33% over fiscal year 2008, to reach a total of \$1,084,000. This gratifying increase came primarily from new hospice giving, government grants and continued partnership of corporate and private foundations.

Many individuals gave memorial gifts, a time-honored way for family and friends to acknowledge the support and comfort that the hospice staff and volunteers provided.

In the area of government grants, Senior Independence was privileged to be the recipient of five awards from the Ohio Department of Transportation. More than \$200,000 was received for the greater Cleveland, Columbus and Southwest Regions, which will fund 80% of the cost of light transit vehicles for our adult day centers, senior centers, and clients receiving medical transportation.

First-time funding was received from two foundations. In the Akron/Canton Region, funding was received from the Stark County Community Foundation to provide assistance with the cost of services at the North Canton adult day center. In the Southwest Region, the Spaulding Foundation provided funding to purchase medical equipment and supplies for the home health program serving five counties in southwest Ohio. In these tough times it is encouraging to see funding from new sources as well as our consistent and dedicated partners.

The adult day center in Akron, located in the Westminster Presbyterian Church, received two grants totaling \$10,000 toward the purchase of much needed new furnishings. The Lehner Family Foundation and the Sisler-McFawn Foundation each provided a grant of \$5,000 to make these new furnishings possible.

Our most successful region for grant funding was Central Ohio, where \$40,000 in funding was awarded in support of the first Senior Impact Series, including \$10,000 from National City Bank (now a part of PNC), and \$30,000 from the Harry C. Moores Foundation. This Senior Impact Series will bring together local, state and national experts to discuss successful aging in Central Ohio.

Advance Planning Study

This fiscal year the Greater Cleveland Region received grants from the Elroy J. and Fynette H. Kulas Fund and the Douglas C. MacDonald and Marguerite C. MacDonald Fund of The Cleveland Foundation to support their education initiative for advance planning.

Prior to embarking on an advance planning educational program, Lois Calderwood, executive director of the Greater Cleveland Region, and her staff conducted a study measuring the use and understanding of advance directives and hospice. This study focused on older adults residing within retirement communities and those living in the greater community.

“Let’s Put David’s Music On.”

Over 20 years ago, Estil Canterbury took her son David to the hospital for a routine scheduled surgery. “I walked in with a little boy on my finger, and I walked out with a helpless little boy in my arms who was completely dependent on me,” explains his mother. Horrible mistakes were made during his surgery and hospital stay, changing their lives forever.

David is now 21 years old and attends our adult day center in Toledo, Ohio. Estil is also very active in The Sorry Works! Coalition, an advocacy organization for disclosure, apology (when appropriate), and upfront compensation (when necessary) after adverse medical events. She spoke at last year’s Senior Independence retreat in Toledo about her and David’s experience and the desire to hear the words, “I’m sorry” from the medical staff at the hospital where David was treated.

Unsure of how she would afford in-home care for David once he was no longer in school, Estil pursued adult day services, which has been a wonderful match for both David and the other clients. Today, David has many caring mothers. The ladies at the adult day center argue over who gets to assist him with his meals and the men make sure he gets to listen to his favorite music. Although David is unable to speak, he is still the charmer, oftentimes returning home with lipstick on his cheeks.

Right: David, dressed in his best, enjoys himself as the ‘life of the party’ during the adult day center’s prom.



Study Results

Calderwood found that within the retirement community 74% of residents had signed advance directives and had given copies to their Power of Attorney (POA). However, in the larger community only 48% of respondents had a signed advance directive. Alarming, in almost all cases where a person had signed directives, they admitted to not having a conversation with their POA regarding these advance directives.

Hospice was also included in the survey. The study found that less than 50% of the greater community residents were familiar with hospice. Many thought hospice was a place to go for end of life cancer care, rather than a philosophy of care for anyone dealing with end of life issues. Calderwood explains, “We knew that part of our education process needed

to include language for engaging family in conversations regarding health care decisions.”

Targeted Advance Planning Education

Senior Independence began contacting senior centers, churches, community centers and retirement communities offering classes on advance planning. More than 700 people attended one of these programs and received a copy of the Ohio advance directive forms, a booklet called “Conversations that Light the Way” and a copy of the courageous conversations presentation, which are also available on www.icaregiver.org. Senior Independence now has over 90 trained advance planning facilitators throughout the state of Ohio.

SENIOR *i*NDEPENDENCE[®] FINANCIAL PERFORMANCE

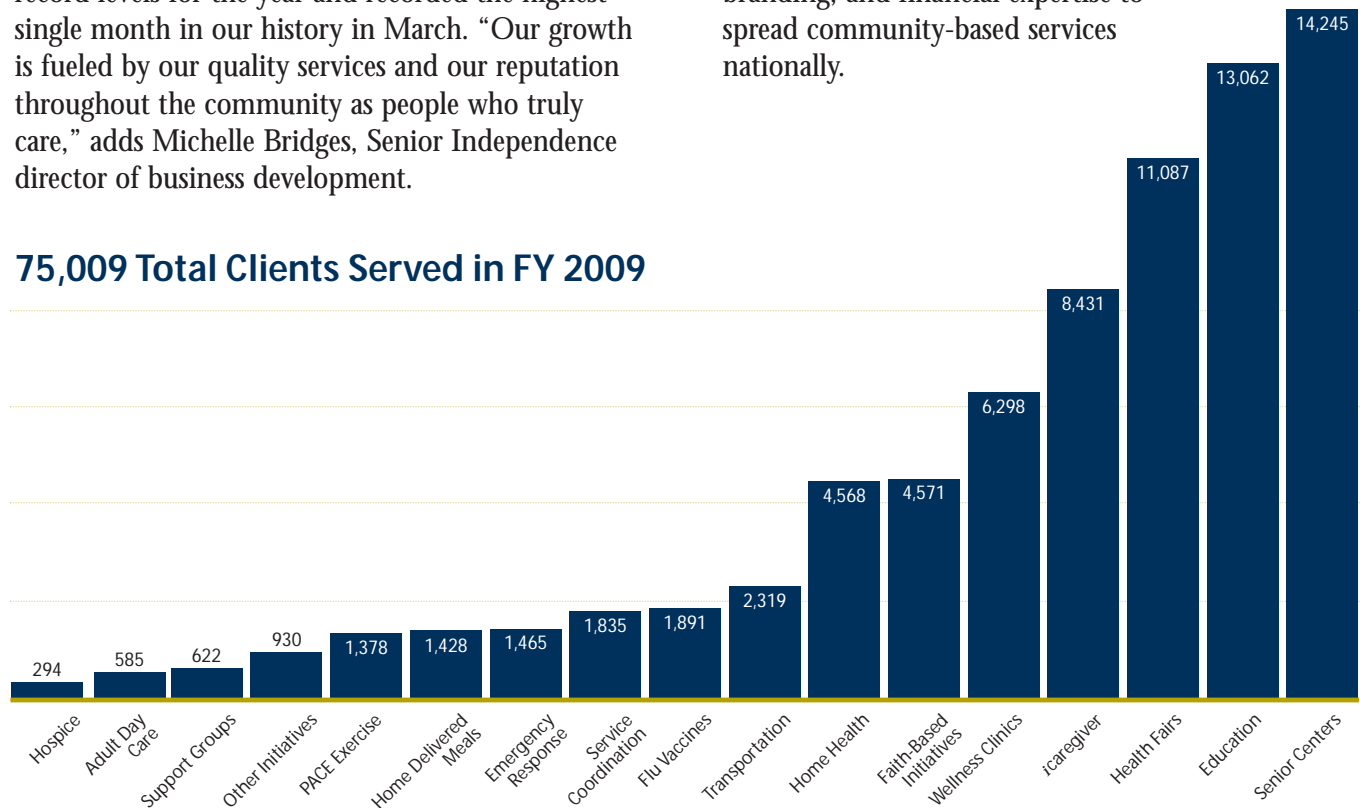
Strong financial performance this year is the result of focused efforts by EVERY Senior Independence team member at every location. Each team member recognizes the importance of using the dollars entrusted to them in a wise and efficient way. “We all strive to ultimately serve more people in more ways and we achieve this goal year after year. Strong performance can only be achieved if everyone in the organization is working with the same goal in mind,” comments Joseph Belvedere, Senior Independence controller. “A job well done in a year where other organizations struggled with the 2009 economic downturn.”

Home health, adult day services, and hospice achieved record volume and record revenue levels in 2009. Overall, revenue grew to \$34 million, up 8.4% versus prior year. PPS episode volume hit record levels for the year and recorded the highest single month in our history in March. “Our growth is fueled by our quality services and our reputation throughout the community as people who truly care,” adds Michelle Bridges, Senior Independence director of business development.

Census in the adult day centers grew. Additionally, we opened our 13th center at Edenvue in the Cincinnati area. Hospice census growth was reported at every site across the state and our seventh and final site (Toledo) began serving patients during the last quarter of this year. Consolidated revenue growth, combined with expense management, resulted in record bottom-line performance of positive \$1.5 million.

In addition to core operations, in 2009 Senior Independence absorbed start-up costs related to the new *i*Partner program. The *i*Partner program allows Senior Independence another growth avenue to “serve more people in more ways.” While partnering with other organizations who have regional expertise, Senior Independence can use more than 25 years of clinical operating experience, strong branding, and financial expertise to spread community-based services nationally.

75,009 Total Clients Served in FY 2009



Summary Financial Results

Statement of Revenue and Expense

Fiscal Year Ended June 30, 2009 (\$000s omitted)

Gross Revenue	\$34,089
Charity	(1,523)
Net Revenue	\$32,566
Expenses	31,040
Excess of Revenues Over Expenses	\$1,526

Key Financial Indicators

Fiscal Year Ended June 30, 2009

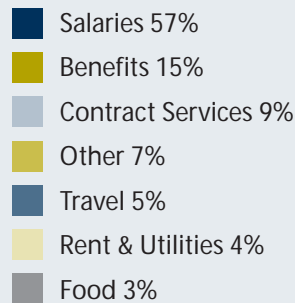
# of PPS Episodes	6,234
Reimbursement per PPS Episode	\$2,932
Accounts Receivable	\$4,990,756
Days in Accounts Receivable	54.6
% of Accounts Receivable over 90 Days	7.1%
Cash Receipts	\$31,770,000

Fiscal Year 2009

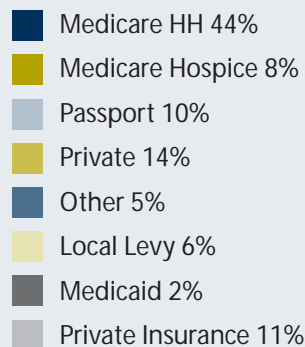
Financial Accomplishments

- i* Record clients served of 75,009 and record 6,234 home health PPS episodes
- i* More than DOUBLED hospice volume and expanded hospice to all seven sites
- i* Achieved a \$1.5 million positive bottom line due to hospice growth and cost efficiency efforts
- i* Bottom line margin improvements at every site across the state
- i* Nearly \$1 million of positive cash flow from operations, despite absorbing heavy investment in the *i*Partner program

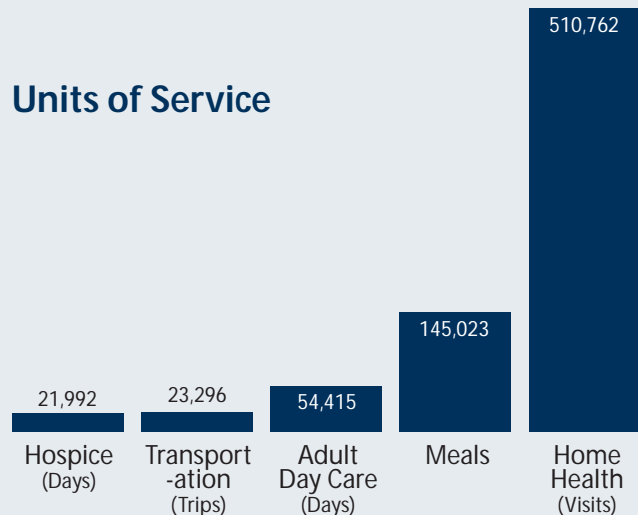
Operating Expenses



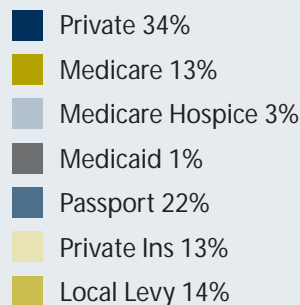
Gross Revenues by Payor



Units of Service



Payor Sources for Units of Service



SENIOR INDEPENDENCE SERVICE EXCELLENCE

Senior Independence Employees Recognized

Top: Sarah Grim, MSW, LISW, corporate director of program services, received the AOPHA Outstanding "Developing Executive Award" for 2009 for her leadership role in launching Senior Independence's hospice. AOPHA is the Advocate of Not-for-Profit Services for Older Ohioans and represents nearly 300 senior service providers in Ohio. Presenting the award is Phil Braisted, AOPHA Board Member, and Martha Kutik, AOPHA Board Chair.

Bottom: The Arthritis Foundation presented Senior Independence Akron/Canton Region with the Partnership Award. This award was given in recognition of Akron's efforts in providing exercise classes for people with arthritis. Mary Kudasick, President/ CEO of the Northeastern Ohio Region of the Arthritis Foundation, presents Karla Ruckman, director of business development and Daphne Massaro, director of adult day services, with the award.



OPRS Community Services Committee

We thank these volunteers who served on the OPRS Community Services Committee during fiscal year 2009.

John Peterson, *Chair*
Amy Roscoe, *Vice Chair*
Rodney Harrison
Gordon Kendall
Dan Lane
Kass Mahdi
Linda Pape
Amy Shore
Faith Williams

Dave Kaasa, OPRS President and CEO
Nancy King, OPRS Senior Independence Executive Vice President/COO
Rod Crist, OPRS Chief Financial Officer
Sally Huston, Vice President Senior Independence Clinical Operations
Joseph Belvedere, Senior Independence Controller
Michelle Bridges, Senior Independence Director of Business Development
Beth Kochheiser, Associate Vice President, Senior Independence Fundraising, OPRS Foundation

Caring for Communities

Walk in any day of the week and you will find something going on. There are the lunches being served, computer classes being taught, entertainment being enjoyed, trips to go on and during tax season an accountant to help file your taxes. They have a prom with dancing, a band and, of course, a king and queen. The Mahoning County Senior Center located in Youngstown, Ohio also has six satellite centers located around the county offering food, fellowship and fun.

The center may be supported with a variety of funds and managed by Senior Independence, but at the heart of any great senior center are the seniors themselves. They are the ones who teach the computer classes, or answer the phone when you call. They run and permanently house the food pantry within this center and cook the lunches that are served.



iPartner Program Launched

This year iPartner was developed in response to market demand. Senior Independence asked twenty Continuing Care Retirement Communities (CCRC), who were considering adding home and community based services to their continuum, if they were interested in partnership opportunities that would jump-start their program. The majority of respondents expressed a strong desire for a collaborative effort between their own organization and Senior Independence. This positive response accelerated the launch of the iPartner program. Currently, four candidate organizations are in the process of becoming iPartners.

Top: Sue Gans, director, and the gang from the Mahoning Senior Center, form a conga line at a recent event.

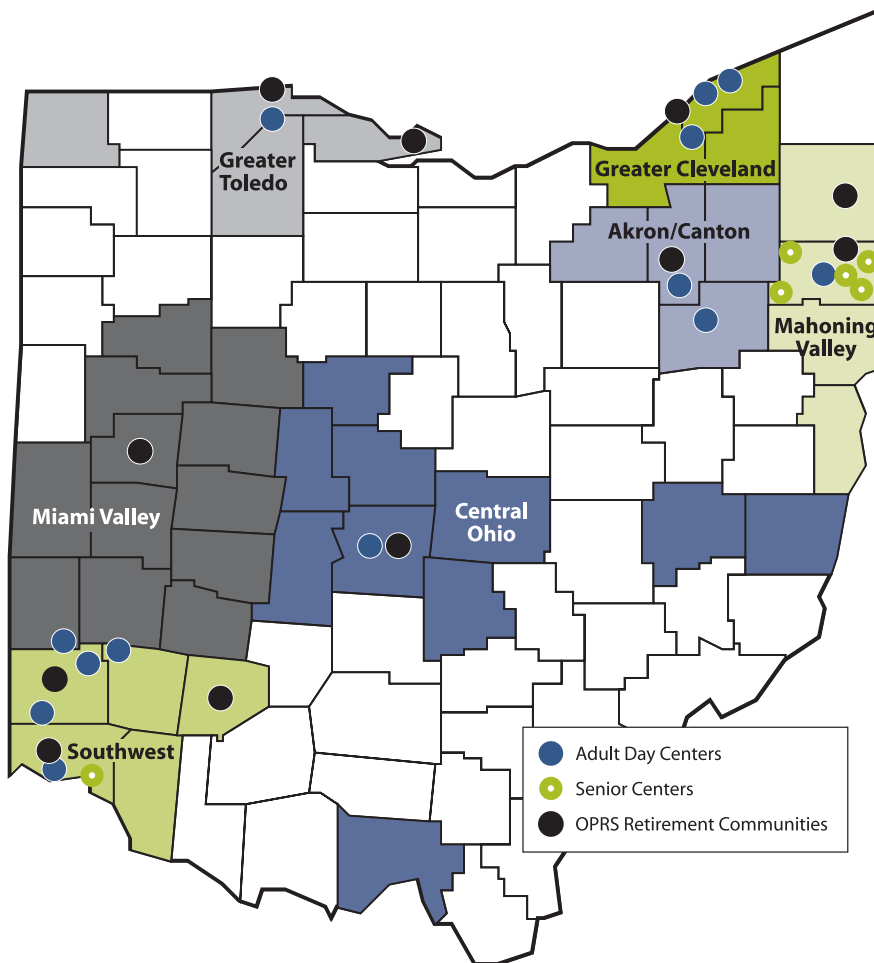
Left: AOPHA Stars recognized for exemplary service are left to right: (back) Natalie Ellison, Karen Rutz, (front) Jeanie Holzbacher and Maretta Smith. **Right:** Akron AOPHA Stars from left to right in the picture are: Pat Goodrich, HHA; Lawrence Anderson, driver; Molly Fagan, housekeeper; and Jessica Reddick.

The Senior Independence iPartner program components include start-up implementation services, on-going management and back office support and brand licensing. This iPartner program serves as a successful business model for other not-for-profit providers who choose to serve older adults in the place they call home. It also brings new geographic growth to Senior Independence, expanding services throughout the United States.



Home and Community Based Services in 42 Ohio Counties

www.seniorindependence.org • www.icaregiver.org



Akron/Canton Region 330-873-3468

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Central Ohio Region 614-433-0031

Linda Artis, *Executive Director*
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Greater Cleveland Region 440-953-1256

Lois Calderwood, *Executive Director*
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Miami Valley Region 937-415-5666

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Senior Independence does not discriminate against any person on the basis of race, religion, age, gender, sexual orientation, disability (mental and/or physical), communicable disease, or place of national origin in admission, treatment, or participation in its programs, services and activities, or in employment.