

Helping More Than 59,577 Ohioans Age in Place



FY2008 Year in Review

Fiscal Year July 1, 2007 – June 30, 2008





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.





WE'RE COMING OF AGE....

Each winter, the New Oxford American Dictionary chooses a '*Word of the Year*.' The word they choose is one that signifies a trend and is considered a 'word to watch.' This year the word selected as *Word of the Year* was locavore. Locavore is someone who buys from farmers' markets or grows or picks their own food, promoting the benefits of local products.

In addition to the *Word of the Year*, the dictionary names several 'runners-up.' Among these runners-up was the phrase *Aging in Place*. The Oxford Dictionary defines Aging in Place as "the process of growing older while living in one's own residence, instead of having to move to a new home or community."

While the dictionary and the popular vernacular might have just caught on to this term, this has been the theme of OPRS Senior Independence for over two decades. As you will see from this report, Senior Independence has an extensive array of services that help seniors age in place, or more accurately, in the place they call home. On the following pages you will read about senior centers, home health care, adult day care, hospice and other services designed to extend and enhance the independence of older adults.

You will also read about services to support family caregivers such as www.icaregiver.org, support groups, and the *icaregiver* guide. Importantly, our services also provide support and assistance to family caregivers who are the real heroes of aging in place.

We are glad that the popular culture has embraced the idea of *aging in place*, one that OPRS has been committed to for over two decades.



Nancy King, EDM
Senior Independence
Executive Vice President/COO



Dave Kaasa
OPRS
President/CEO

Fiscal Year 2008 Strategic Objectives

- i* Provide appropriate mix of high quality services in each market we serve.
- i* Optimize the development of Senior Independence to serve more people in more ways.
- i* Invest in people and processes to achieve service excellence.
- i* Enhance Senior Independence services to older adults by increasing our financial strength.



FOUNDATION SUPPORT

Senior Independence fundraising increases 8%

Senior Independence fundraising grew to \$814,470; an increase of 8% over the previous year. A challenging economic environment meant that new sources of funding needed to be tapped while still reaching out to those traditional and stable donors who have supported Senior Independence for many years. In three regions, Greater Cleveland, Miami Valley and Southwest, giving increased by more than 100% from the previous fiscal year.

Support for Advance Planning

Highlights from the year are many, but the most significant of all was the \$97,604 in grant funding received from the Lake Geauga Fund and the Cleveland Foundation for advanced care planning services in the Greater Cleveland Region. This grant allows for the hiring of a full-time coordinator to implement the program that will serve as a precursor to the opening of hospice services next fiscal year.

Additional funding for Senior Independence's advance planning initiative includes the Akron/Canton Region, which received the first-ever funding for OPRS from the Akron Community Foundation. This \$6,000 grant will provide for Respecting Choices® materials that will be utilized throughout this area. The Central Ohio Region received a \$25,000 grant from the Columbus Foundation for end-of-life education.

Senior Centers

In the Southwest Region the Josephine Schell Russell Foundation provided a grant of over \$7,000 to match funds that have been received from the state of Ohio Department of Transportation for a new wheelchair accessible vehicle to serve the Anderson Senior Center.

First-time foundation funding was received from the Paul G. Duke Foundation for wellness clinics in the Miami Valley Region. First-time funding, such as this and the Akron Community Foundation, opens new doors for Senior Independence and the OPRS Foundation will continue to seek opportunities to share the message of the wonderful work of Senior Independence.

The Mahoning Valley Region has the first ever opportunity for Senior Independence to apply for federal appropriations funding. Karen Ambrose, executive director of the Mahoning Valley Region, has worked closely over the years with her state and local government regarding aging in place services setting the stage for additional government support. This funding would provide over \$350,000 toward the expansion of the Senior Independence Senior Center in Youngstown. "The federal appropriations would require that we match their funding dollar for dollar," states Ambrose. To-date the OPRS Foundation and Senior Independence has secured \$105,000 in funding commitments.



“Our senior center director helps make it a happy place for seniors to come enjoy meals, activities, education, and friendship. Thanks for the newsletter. It is great!” — *Senior center participant*



Top: The last two years Senior Independence expanded its adult day and senior centers through grant and foundation support.

Right: Wellness clinics in Miami Valley receive new funding. “Our work with local builders has allowed us to establish wellness clinics within neighborhoods where seniors live,” states Ricki Maxwell, executive director of the Miami Valley Region.

Left: Karen Ambrose, executive director of the Mahoning Valley Region, and Sue Gans, senior center director, with a check from the Mahoning Valley commissioners.





HOSPICE

Success of hospice drives statewide expansion

Statewide Certification Granted

The success of Hospice in the Central Ohio region and the OPRS commitment to a complete continuum of care for its residents and clients continues to drive expansion of the program statewide. This year Akron, Southwest and Miami Valley became hospice certified and by the end of next fiscal year all of Senior Independence's regional offices will begin providing hospice services. With the addition of hospice to the continuum of care, additional patients have been served from both the greater community and the OPRS continuing care retirement communities.

"Feel the sun on my face."

The executive director of the Southwest Region, Joan Punch-Fleming began setting the groundwork for their hospice program by arranging an appreciative inquiry. "I wanted the community and our staff to feel a part of something important and thought this would be a great way to kick off our hospice program," admits Punch-Fleming. Punch-Fleming invited employees of Senior Independence, OPRS staff and leaders from the greater community to answer questions regarding their best experiences with hospice. "We were looking to the experts in the community to help us co-create our guiding star or vision for our staff to hear and embrace," Punch-Fleming explains.

Everyone selected the image and story of a client who wanted to feel the sun on his face one last time — his request was fulfilled and he was able to die with the sun on his face. "That was a very powerful message and picture for us. It was such a simple request and yet such an important thing for this patient. We knew we had found our vision for our hospice program," relates Punch-Fleming.

The Hospice Experience

At the heart of the hospice program is the focus of care aimed at the patient and their family through the interdisciplinary team. This team consists of the social worker, physician, chaplain, nurses, aides and pharmacists — together they discuss how they can work to improve the quality of life for the patient. This might mean that pain medication is reduced during a certain time of the day to accommodate a patient's desire to resume a hobby he has long enjoyed.

"That is the advantage of hospice — looking at the patient and being fully focused on that person's quality of life," reports Sally Huston, Senior Independence vice president of clinical operations. "We learned from hospice that making a difference in someone's life empowers the patient and gives them back a life full of meaning. It isn't just about meeting their clinical need. We have learned a great deal from our hospice experience. We have an opportunity to do more for all of our clients."



“Thank you is just simply not enough. What do you say to people who support and serve families the way that you do. I’ll simply say you people must know God.” — *Hospice patient’s family*



Top: Maureen Carr receives her prayer shawl from Linda Bryant, RN.

Left: Dr. Jeffrey Milks joined the Senior Independence corporate support team in July 2007. Milks will provide support for each site’s hospice, and will also oversee the development of Senior Independence’s nurse practitioner program.

Right: Sarah Grim, MSW, joined the corporate Senior Independence support team in July 2007 as corporate director of program services. Grim oversees all of the supportive and social services for Senior Independence.





MAKING A DIFFERENCE

Giving back to our seniors and their families

Extending that same aspect of the hospice philosophy, Senior Independence created a program entitled: Make it Happen. The intention of this program is to make a difference in our clients' lives by attending to non-medical needs that enhance their quality of life. "This program is really in its infancy, but already we have numerous stories to share that really go to the heart of all we intend to do," explains Nancy King, chief operating officer of Senior Independence.

Making wishes come true

Make it Happen is really a program that empowers employees in fulfilling clients' wishes. It gives Senior Independence an opportunity to make a client's wish come true and provide a lasting memory for families. These 'moments' are sometimes larger than life — like a ride on a Harley, or simply a pulling together of families — like a family trip to the zoo. "The objective of this program is to give something back to our seniors and their families. You would be surprised how much the families get out of these moments," says Mindy Wendling, Southwest Region's director of program services.

The ride of a lifetime

When Bessie Anderson, a legally blind, seven year client of Franklin's Adult Day Center made a wish on her 96th birthday — to ride on a Harley, the staff and volunteers took it upon themselves to make it happen. With some connections through the center's volunteers, Harley owners from the area gave Bessie the ride of a lifetime on her 97th birthday. Newspaper photographers, staff and family were on-hand to witness her wish come true.

An autographed photo

When Rosely Dearth, a Senior Independence Hospice patient from Miami Valley, mentioned her desire for a photo of Tom Selleck, the nurse talked with the social worker about how they might go about getting her the photo. They decided to take a chance and contact Tom Selleck's agent. The agent heard their story and immediately had an autographed photo of Tom Selleck sent out to Mrs. Dearth. Her son was able to share the picture with his mother, who upon seeing the photo grabbed her son's leg. "I am not Tom Selleck," laughed her son. This story reflects the spirit of this program: to create lifelong memories for our clients and their families.



“Thank you just isn’t enough for all that you have done for my mom. To know that you all gave her something to smile and laugh about during a difficult time makes me very grateful for your program. Thanks again!”

— *client’s family*

MAKE *IT* HAPPEN™
MAKE A DIFFERENCE



HOME HEALTH SERVICES

Helping seniors get back on their feet

This year Senior Independence's Central Ohio and Southwest Regions received the Home Care Elite Top 25% distinction. Based on national quality of care measures, these agencies showed better than average improvement in patients receiving skilled services in their homes. Many physicians and facilities look for agencies with better than average outcomes when referring or discharging their patients for continued services in their own homes.

HomeCare Elite

How does Senior Independence improve quality outcomes? Continual training of staff. This year training focused on: Documentation Challenges; Medicare Compliance & Ethics; Diagnostic Coding; and Respecting Choices.[®]

Cross training for documentation challenges and Medicare Compliance/Ethics were held throughout the state and included 86 nurses, therapists and home care coordinators.

“Our focus was to assure a clear understanding of the rules for home health care eligibility, compliance and documentation. Having the home care coordinators and clinicians learning and working together makes our teams stronger and helps us grow. Potential clients may benefit from many of our programs. Our challenge is to help them find the right program for each client,” Sally Huston, vice president of clinical operations, points out.

“Barb and Mary made the process very easy for our family. They were so pleasant to work with. I have already told others about the program to see if Senior Independence could help them. Thank you again!”

— *client's family*

Making the transition to prospective payment reimbursement system (PPS)

In January of 2008, the government significantly revised its prospective payment reimbursement system. This system is more complicated and difficult to understand, so training started early in the fall of 2007 to better prepare the staff for the changes. The months of training paid off with a smooth transition to the new PPS system.



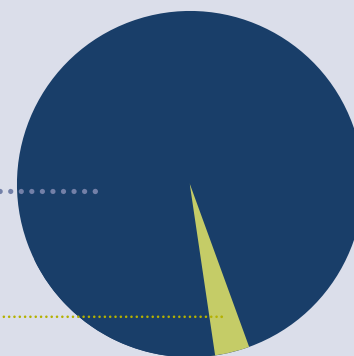
Client and Family Satisfaction Survey Results

Overall Satisfaction with Senior Independence Home Care, FY 2008

Total Satisfaction of 96.7%

Very Good (76.6%) and Good (20.1%)

Other 3.2%



Left: Akron staff members Joyce Wendel and Marcia Boote are two of 22 therapists in Ohio who are geriatric certified specialists (GCSs), licensed therapists certified in geriatric therapy by the American Board of Physical Therapy Examiners.

Right: Michelle Hawkins, Mahoning Valley Senior Independence home care coordinator, visits one of Brazil's nursing homes during a five week visit to study their health care system and to educate them about the United States' health care system.





ADULT DAY SERVICES

Adult Day Services grows to 13 centers in Ohio

The future need for adult day services remains strong as our older population continues to grow and more and more seniors choose to age in place.

According to the Family Caregiver Alliance (FCA) 34 million caregivers provide care for someone aged fifty plus. Adult Day Services is one option for caregivers and seniors who wish to remain at home. Senior Independence adult day centers are open five days per week with transportation to and from the center. Flexibility allows caregivers to utilize the program for one day up to five, depending on the need.



The Senior Independence Adult Day Center (ADC) located in Akron's Westminster Presbyterian Church celebrated 25 years of service with a luncheon program. Music was provided by Westminster Presbyterian's bell choir and a special recognition was given to Ina Federman, a center volunteer, who for the last 25 years has been coming into the center to play the piano for the participants. Part of the program also included reflections of the past, present and future. In the Akron/Canton region there are two Adult Day Programs, both located within churches. "There is an advantage to being located within a church — it is less threatening, and a familiar place for many of our participants," says Daphne Massaro, Akron/Canton adult day program director.

"It gives me peace of mind leaving my husband at Senior Independence. I can leave and enjoy my day knowing he will be well cared for."

— *Adult Day Center participant's spouse*

The Greater Cleveland Area opens third adult day center

With waiting lists at both the Breckenridge Village and the Orange Adult Day Centers, Greater Cleveland opened a third adult day center in Painesville, Ohio. With assistance from The Murch Foundation grant, Lois Calderwood, executive director of the Greater Cleveland Region, started talking with area community leaders about developing adult day services in regions that were underserved.

"We looked at our waiting list and saw that a majority were from the Painesville area. I approached their community leadership about adult day services and the grant that we had available to us," Calderwood explains. "It was a really good fit for them and they were willing to partner with us. We worked with the Lake County Development Corporation who built the facility around our program." The opening of the Painesville center brings a total of 13 adult day centers in Ohio and gives Senior Independence the continued distinction of being the largest not-for-profit provider of adult day centers in Ohio.



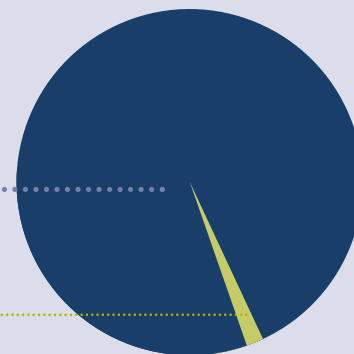
Client and Family Satisfaction Survey Results

That they would recommend Senior Independence Adult Day Services, FY 2008

Would Recommend 98.3%

Strongly Agree (66.8%) and Agree (31.5%)

Other 1.6%



Top: Ribbon cutting ceremony at the new Senior Independence Adult Day Center in Painesville, Ohio.

Left Louise Torgerson, adult day center participant, and her daughters share their story at Akron's 25th anniversary luncheon.

Right: Akron ADC participants win First Place at the Regional Level of the AOPHA Art Show. Left to Right: Ruth Sims, Frankie Adcock, Carrie Cloyd and Annie Hunt.





COMMUNITY SERVICES

Continuing to care within the communities we serve

Advance Planning gains momentum

In a continued effort to assist seniors in their choice to age in place, two staff members were certified as Respecting Choices® trainers. Respecting Choices® is a nationally recognized program in advance planning. These two certified trainers trained 72 facilitators including staff from the OPRS communities and Senior Independence. These facilitators were then able to hold educational sessions in advance planning for community groups, senior centers, health care facilities, and church groups throughout Ohio.

The Respecting Choices® program guides families on how to have a structured conversation focusing on preferences for end-of-life care. Participants receive booklets containing many of the documents needed in making advanced plans. Facilitators help older adults and their families clarify what documents are used and what the many terms in health care mean.

With fewer than 50 percent of terminally or severely ill patients having any advance directive documentation in their medical record, Senior Independence will continue to help support older adults and their families in their quest for health care planning and choice.

icaregiver receives AOPHA Excellence in Innovation Award

This year the *icaregiver* website was recognized by AOPHA (The Advocate of Not-for-Profit Services for Older Ohioans) with the Excellence in Innovation Award. This award recognizes innovative contribution through technology, education, and unique programming and was presented to Senior Independence at the 2008 Annual AOPHA Awards Celebration.

In September of 2007, the Central Ohio regional office received support from Cardinal Health and National City for the printing of the *icaregiver* guide. This guide is a companion piece to the award winning *icaregiver.org* website. "We wanted families to have a physical document that contained all of their necessary information," says Linda Artis, executive director for the Central Ohio Region. With additional support, Senior Independence hopes to expand the availability of this guide to all regions in the future.

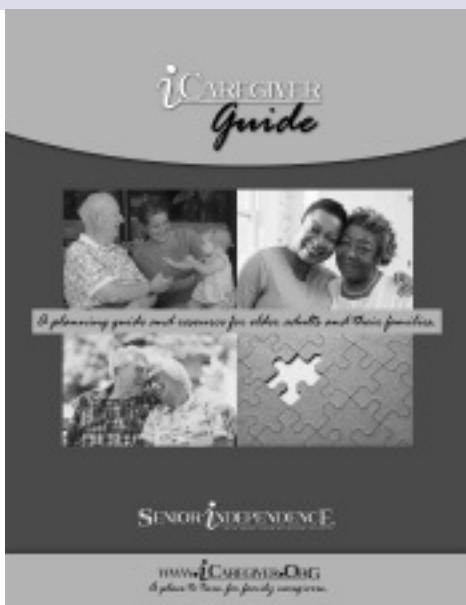
Continuing to care through health and wellness

This year Senior Independence launched a campaign on health and wellness for seniors. In addition to the wellness clinics that are held throughout the state, monthly printed materials were distributed within clinics, senior buildings, physician offices and health care facilities. Each month focuses on a different senior health topic. "This is an effective way to reach out to the community and get some heads turning for Senior Independence," explains Michelle Bridges, Senior Independence corporate director of sales and marketing.



“It is nice to know that whatever we may need there is someone or somewhere to turn for more information and education.”

— icaregiver visitor feedback



iCAREGIVER.ORG

Total hits for fiscal year 2008 = **13,513**



FINANCIAL PERFORMANCE

Another year of success, expansion and investment

For Senior Independence, fiscal year 2008 was again a record year of success, expansion, and investment. “Senior Independence team members have an amazing ability to stay focused on our strategic plan despite an environment of dramatic economic change,” comments Joseph Belvedere, Senior Independence controller. “Our strength and agility lies in the fact that our clinical and financial operational teams work together seamlessly.”

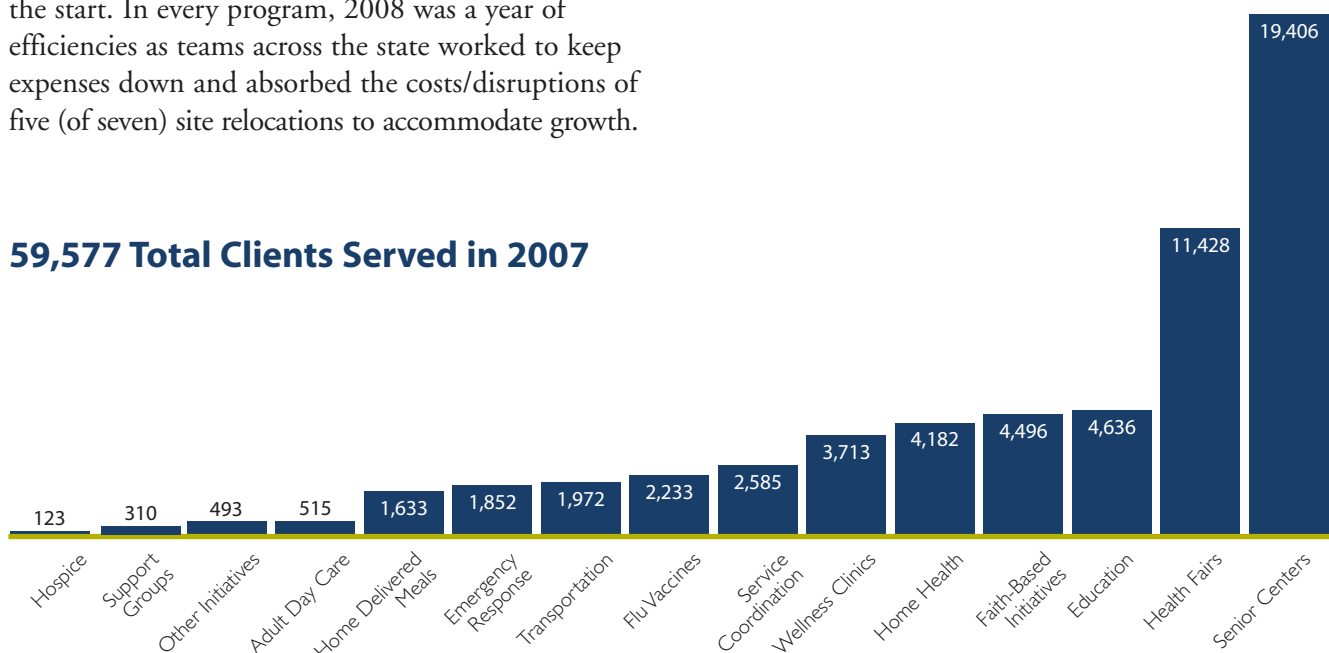
Top line records were achieved in home health, adult day services, meals programs, service coordination work, senior center revenue, and hospice in 2008. PPS Episodes were up 8% in the year. Reimbursement per Episode was flat with 2007 despite wide-reaching changes in Medicare case coding rules and our clinical and financial staff worked tirelessly to interpret and incorporate the changes into their daily operations.

Our new Adult Day Center in Painesville bypassed expectations of census and financial soundness from the start. In every program, 2008 was a year of efficiencies as teams across the state worked to keep expenses down and absorbed the costs/disruptions of five (of seven) site relocations to accommodate growth.

Expansion was also a theme in 2008 as Hospice and Medicare Advantage Plan clients grew at a significant rate. Hospice revenue ended the year at five times the revenue of 2007. The growth reflects our expansion from one operational site in 2007 to four hospice sites in 2008. Bottom-line hospice results continue to absorb start-up costs. 159% growth in Medicare Advantage Plans (Managed Care) drove a need to quickly respond to growing receivables as formerly one channel of collection (Medicare) turned into eleven channels of collection. Automation of the billing and collection process has, and will continue to, improve receivable balances since the initial client shift from traditional Medicare.

Finally, 2008 was a year of investment. As part of our strategic plan, Senior Independence laid the groundwork for disseminating decades of industry knowledge by way of opening affiliation sites. A pilot site is expected to start-up in the coming months.

59,577 Total Clients Served in 2007



Summary Financial Results

Statement of Revenue and Expense

Fiscal Year Ended June 30, 2008 (\$000s omitted)

Gross Revenue	\$31,448
Charity	(1,696)
Net Revenue	\$29,752
Expenses	29,539
Excess of Revenues Over Expenses	\$213

Key Financial Indicators

Fiscal Year Ended June 30, 2008

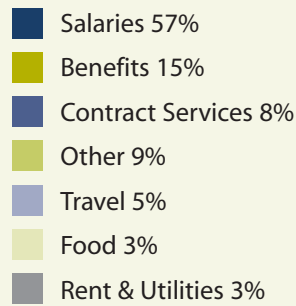
# of PPS Episodes	6,177
Reimbursement per PPS Episode	\$2,769
Accounts Receivable	\$4,166,402
Days in Accounts Receivable	50.2
% of Accounts Receivable over 90 Days	14.5%
Cash Receipts	\$28,320,000

Fiscal Year 2008

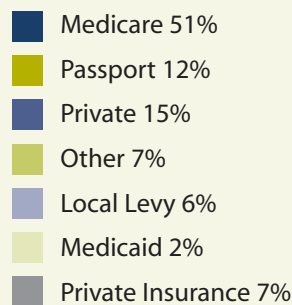
Financial Accomplishments

- i* Surpassed the \$30 million Gross Revenue level
- i* Increased year-over-year PPS episode volume by 8% to a record 6,177 episodes
- i* Grew hospice program to 5 times its 2007 size
- i* Recorded a \$213 thousand positive bottom line while investing in new programs like hospice and affiliation expansion
- i* Embraced drastic changes in Medicare rules and shifting patient base to managed care (private insurance)

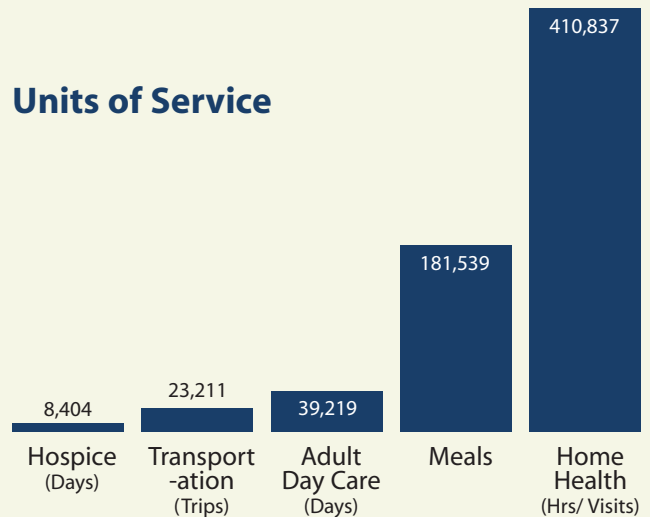
Operating Expenses



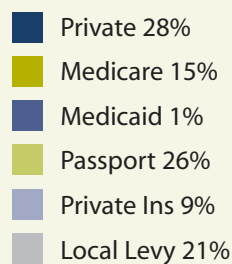
Gross Revenues by Payor



Units of Service



Payor Sources for Units of Service





SERVICE EXCELLENCE

Staff recognized for their service to seniors

“Our success in helping seniors age in place comes from those who are directly providing the care and assistance to our clients,” states Ann Heringhaus, executive director of the Greater Toledo Region. This year thirteen employees were honored for their exemplary service during AOPHA (The Advocate of Not-for-Profit Services For Older Ohioans) regional luncheon events.

Continuing to care for our employees

When OPRS (Ohio Presbyterian Retirement Services) began looking at the data from their employee opinion survey they noticed a significant correlation. Locations with high recognition scores also had better health department reviews, greater client satisfaction and higher wellness indicators. Most significantly the employee turnover was lower than industry averages. Senior Independence’s overall employee turnover is 23%, well below the national average of 44% for other home healthcare agencies. This connection between employee recognition and patient outcomes is making national news across the country and has been featured in *HR Management* magazine.

Community Service Volunteers

We thank all of these volunteers and staff who have provided their time and talents to serve on the OPRS Community Services Committee during Fiscal Year 2008

John Peterson, *Chair*

Jean Evans

Rodney Harrison

Gordon Kendall

Dan Lane

Kass Mahdi

Linda Pape

John Perkins

Amy Roscoe

Faith Williams

Staff

Dave Kaasa, OPRS President/CEO

Nancy King, EDM, OPRS Senior Independence
Executive Vice President/COO

Rod Crist, OPRS Chief Financial Officer

Sally Huston, MSN, Vice President, Senior
Independence Clinical Operations

Joseph Belvedere, Senior Independence Controller

Michelle Bridges, Senior Independence,
Director of Sales and Marketing

Beth Kochheiser, Associate Vice President,
OPRS Foundation



Toledo's AOPHA Stars pictured left to right: Jenny Brisbane, Mary Shamy, Jackie Hawthorne, Judy Quick, Beverly McNear, with Sue Trumbull, marketing director, and Ann Heringhaus, executive director. Not pictured: Mary Adams-Ignasiak and Tina Evans



Akron's AOPHA Stars pictured left to right: Michelle Stokley, Christie Balyer, Sheila Flannery, executive director, Mary Beth Alleman and Annie Stevens. Not pictured: Willie Jones



Central Ohio's AOPHA Stars pictured left to right: Pauline Kirk, Victor McPherson and Nancy Tillinghast.



Ann Munafo, with the Southwest Region, receives the Andree Bognar Award for her outstanding efforts in the field of adult day services.

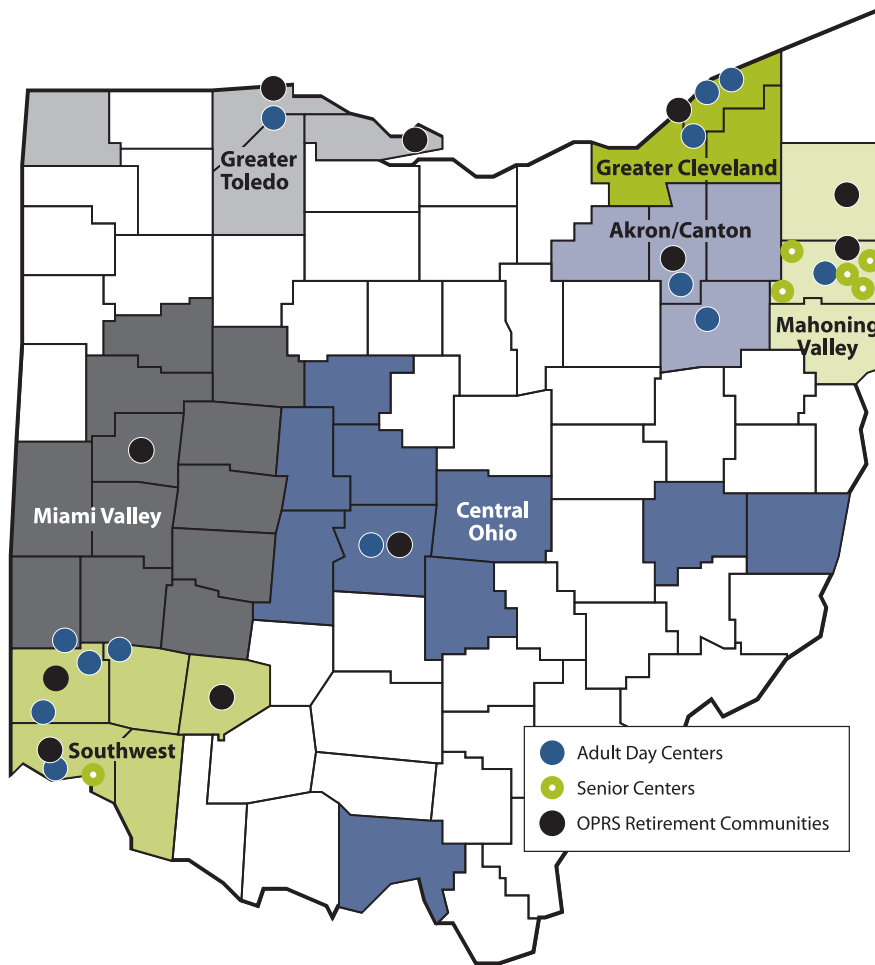
OUR SERVICES

- Adult Day Services
- Adult Education Classes
- Caregiver Respite
- Companionship & Escort
- Flu Vaccines
- Home Care
- Home Delivered Meals
- Home Health Aides
- Home Health Care
- Home Telehealth Systems
- Hospice
- Light Housekeeping, Linen Changes & Laundry
- Meal Preparation
- Medication Dispensers
- Medicine Administration
- Occupational Therapy
- Personal Care Assistance
- Personal Emergency Alert Systems
- Physical Therapy
- Senior Centers
- Service Coordination
- Skilled Nursing
- Social Work Services
- Speech Therapy
- Support Groups
- Technology Support
- Transportation
- Wellness Clinics



Home and Community Based Services in 41 Ohio Counties

www.seniorindependence.org • www.icaregiver.org



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Central Ohio Region 614-433-0031

Linda Artis, *Executive Director*
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Columbus, Ohio 43229

Greater Cleveland Region 440-953-1256

Lois Calderwood, *Executive Director*
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Willoughby, Ohio 44094

Miami Valley Region 937-415-5666

Ricki Maxwell, *Executive Director*
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Southwest Ohio Region 513-681-8174

Joan Punch-Fleming, *Executive Director*
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Greater Toledo Region 419-865-1499

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Mahoning Valley Region 330-533-4350

Karen Ambrose, *Executive Director*
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