



Boston Senior Home Care

FY2014 Annual Report

Fiscal Year Ending June 30, 2014



A Message from the Chief Executive Officer and Board President



Greetings! As Boston Senior Home Care (BSHC) completes its 40th year of service to the people of Boston and surrounding communities, we are pleased to present the BSHC FY 2014 Annual Report. We had an exciting and dynamic year and experienced growth in both our programs and the ranks of our employees. Our monthly average number of clients served went from 5,246 to 5,807, an increase of 11%. Our robust Senior Care Options Program increased from 2,949 clients to 3,299 clients, an increase of 12%, making ours one of the largest programs in the Commonwealth. And still growing! In order to serve all these clients, an appropriate number of well-trained, professional staff is needed. BSHC's total positions grew from 141 in FY'13 to 158 in FY'14.

But numbers don't tell the whole story. Everything about the past year signifies growth: growth in programs, growth in community relationships, and growth in scope of practice. While fiercely adhering to the essence of our mission to keep older adults and individuals with disabilities in community settings, we are expanding and intensifying our role in the Boston health care arena. We signed our first business agreement with a community health center to provide enhanced case management services and are on track to sign an additional agreement this fall. We expanded our supportive housing sites and were funded for an additional site by the Executive Office of Elder Affairs for FY'15. We expanded our physical space in our existing green, non-profit building, adding an additional floor and extending our lease to eleven years.

Please take a few minutes to read this entire report. We are proud of the past year, but even more excited about the year to come. We plan a bang up 40th Anniversary Celebration and Fundraiser in November with a goal of raising \$100,000 to assist those who do not qualify for state-funded services. We also hope to launch our first private pay case management program in the spring of 2015 to serve those who can afford to pay. Accomplishing those two goals will be a milestone in the history of Boston Senior Home Care, and then we can truly say we provide Home Care for All! Thank you for your continued support in these efforts.

Linda S. George
Chief Executive Officer

Paul K. Wong
Board President

A Brief History of the ASAP System and Boston Senior Home Care

The Early Years

It's hard to believe that 40 years have passed since BSHC began providing support services and programs to older adults and individual with disabilities in Boston. Here are some reflections on what was happening in the nation and in Massachusetts 40 years ago. In 1965, the federal government passed an amendment to the Social Security Act to address the growing concern about the fate of American elders. It was called the Older Americans Act and it was passed to "create a comprehensive and coordinated system of care for elderly Americans." Every state was required to assign a specific office to address aging issues. In Massachusetts, the Executive Office of Elder Affairs (EOEA) was created. States were also required to designate sub-state area agencies on aging to plan for and monitor the needs of elders living in specific geographic areas.

While this was being considered nationally, Massachusetts had its own champion, Frank Manning, who was busy convincing the legislature and then Governor Frank Sargent that the Commonwealth needed a state-funded home care program for elders. Even by today's standards, the model that was created was extremely innovative:

- Governed by consumer-controlled, non-profit organizations
- Established an independent case management model
- Created a social versus a medical model of care

In the early 1970s, the Commonwealth contracted with twenty-seven home care corporations covering every geographic area in Massachusetts. BSHC was incorporated July 3, 1974 and has been serving the people of Boston ever since. But, over the years, how that service has grown. In 1974, BSHC had three staff members, a few hundred clients and a budget of \$100,000. At the end of FY'14 BSHC had a staff of 158, 6,200 clients and a budget of \$31.1 million. In the early days home care corporations provided simple support services such as home delivered meals, homemaking and laundry. Growth was slow but steady and BSHC established itself in the community.

Home Care Becomes Aging Services Access Points (ASAPs)

As the years went on, the role of home cares evolved from providing community support services to qualified older adults to actively managing programs designed to keep nursing home eligible individuals living in the community. At this time RNs were hired to provide personal care assessments and monitoring and oversee the nursing home pre-admission screening program. In the mid-nineties, Mass Home Care wrote the state law that would create the **ASAPs**, a one-stop-shopping approach to long-term care. It was signed into law by Governor William Weld in April 1996. EOEA was given the authority to designate and oversee ASAPs. BSHC was designated as an ASAP in December 1997. ASAPs have five key functions: 1) to provide information and referral, 2) to conduct a comprehensive needs assessment of older adults, 3) to develop a care plan to address unmet needs, 4) to purchase services to implement the plan, and 5) to monitor the effectiveness of the care plan.

ASAPs Evolve into Community Partners

BSHC continued to grow through the nineties and into the twenty-first century. New partnerships were formed with new entities such as Senior Care Options (SCOs). These organizations provide all inclusive services to adults 65 and older who are eligible for both Medicare and Medicaid. This program exploded over the past decade and BSHC currently

serves over three thousand SCO clients. The agency also participated in the federally funded National Family Caregiver Program, designed to recognize the contributions of community caregivers and fund programs to assist this important group. Numerous special programs were developed and BSHC became the only Boston ASAP to have supportive housing sites. Partnerships with community entities were forged and BSHC sought grants for special programs. The future was upon us and BSHC began its quest to provide expanded services to Boston hospitals and medical practices. BSHC no longer provides just support and assessment services, but it partners with other entities in providing transitional services from acute care and management of chronic conditions.

Highlights of Direct Service Programs

Contracted services to hospitals and community health centers – BSHC has met with various representatives from Boston hospitals and community health centers and is in the final phase of providing enhanced services to two major entities. We project that contracts with medical organizations will be a major part of our business in the years ahead.

Senior Care Options – Although BSHC has been participating in this program for ten years, Tufts Health Plan was added to the SCO contracts in FY'14. This makes a total of five contracts with senior care options organizations. This is an all-inclusive program for adults who are 65 years and older and must be on MassHealth Standard, but can also be dually eligible (Medicaid/Medicare).

The Personal Care Attendant Program (PCA) – Although this program was initiated in FY'13, it is worth highlighting because of its growth in the past year. The PCA Program went from 13 participants in FY'13 to 151 in FY'14, an increase of 92%. This MassHealth program helps people with long-term disabilities of any age to live at home by providing funds to hire personal care attendants to help with their care. Unlike other programs, PCA is a participant-directed program.

One Care – This is a health care option plan for Massachusetts adults, age 21-64, who are eligible for both MassHealth and Medicare (dually eligible). The One Care target population includes non-elderly adults with physical disabilities, developmental disabilities, behavioral health issues, and substance abuse disorders. One Care combines funding from MassHealth and Medicare in an integrated managed-care system. The goal of One Care is to provide higher quality care for dually eligible adults under age 65 at a lower cost than MassHealth and Medicare provide separately. BSHC currently participates in two programs, Network Health and Commonwealth Care Alliance, in order to provide long-term support coordination for the One Care population.

The Family Caregiver Support Program (FCSP) of Boston – This federally funded program offers caregivers assistance and support to ease the strain and reduce the challenges of caregiving. FCSP empowers caregivers by providing information, education, support, and services that enhance quality of life. This program is available to caregivers providing care for family or friends who are 60 years of age or older, or individuals of any age with Alzheimer's disease and related disorders. Caregivers who reside in the City of Boston or who are providing care for a Boston resident are eligible for these services. This year, BSHC served 404 caregivers across all of the Boston neighborhoods.

Money Follows the Person (MFP) – BSHC responded to the Request for Proposal for MFP from the Executive Office of Health and Human Services and was granted a contract to participate in the program. Launched in the fall of 2013, this program provides resources and support for MassHealth consumers who have been living in a nursing facility or other institution for 90 days or more to safely return to their communities.

Healthy Living Programs – BSHC received a \$19,000 grant from the Tufts Health Plan Foundation, Inc. for a Falls Prevention program at two of BSHC's Supportive Housing sites. The first session was completed in June 2014 at the Lower Mills Supportive Housing site in Dorchester.

Other Initiatives

Supportive Housing – BSHC invested in a dedicated Community Supportive Housing director, whose main focus is to seek new funding streams for expansion of additional new supportive housing sites. After submitting a request to EOE A for an additional supportive housing site, BSHC was granted \$133,992 to open an additional site in Dorchester.

Silver Linings – In FY'14, BSHC initiated an ongoing television program on the Boston Neighborhood Network. The program is dedicated to conversations about long-term services and supports and features experts in aging services, upcoming workshops, and words of encouragement for the aging and caregiving population of Boston. Abby Mojica, Chief Program Officer at BSHC, hosts the show.

Human Resources – In FY'14, BSHC restructured and enhanced the HR department by investing in a dedicated Senior Benefits Professional and a dedicated Senior Human Resources Professional/Recruiter. This increased the agency's profile by developing new recruitment programs. The Agency's new employee mentoring program was also expanded.

Management of Information Systems – BSHC's IT department developed a DVD training library for program and department-specific training that can be accessed in the office or remotely. The IT team also connected the Personal Care Attendant application to the billing software used by the Fiscal team, saving hundreds of hours of data entry. The IT team helped to fully automate the hiring process including communications to managers and equipment assignments to new hires. The IT team also developed a database to track equipment inventory.

Fundraising – BSHC launched a formal Annual Board Giving Campaign which was well received by the Board. A consumer direct mail appeal targeted to vendors, former board and friends of BSHC was also launched. Through these efforts, \$6,200 was raised. Also, a 40th Anniversary Celebration & Fundraiser is planned for FY'15 with a goal of raising \$100,000 to be used to provide support and services to individuals who need help but do not qualify for state-funded services.

Boston ElderINFO (BEI) – In FY'14, BEI referral numbers went up from 4,212 to 6,444, representing a 35% total increase in referrals. This growth is primarily due to BSHC's newest programs, such as: One Care, Personal Care Attendant (PCA), SHINE, Money Follows the Person, and the Family Caregiver Support Program, as well as other extensive outreach efforts. BEI received a 96% satisfaction rate from EOE A.

Boston ElderINFO Statistics	2014	2013	2012
Documented Calls	15,828	9,315	7,219
BSHC Referral Total	1,927	1,271	1,017
Total BEI Referrals	6,444	4,212	4,010
BSHC Options Counseling Referrals	60	65	45
Total BEI Options Counseling Referrals	176	234	152

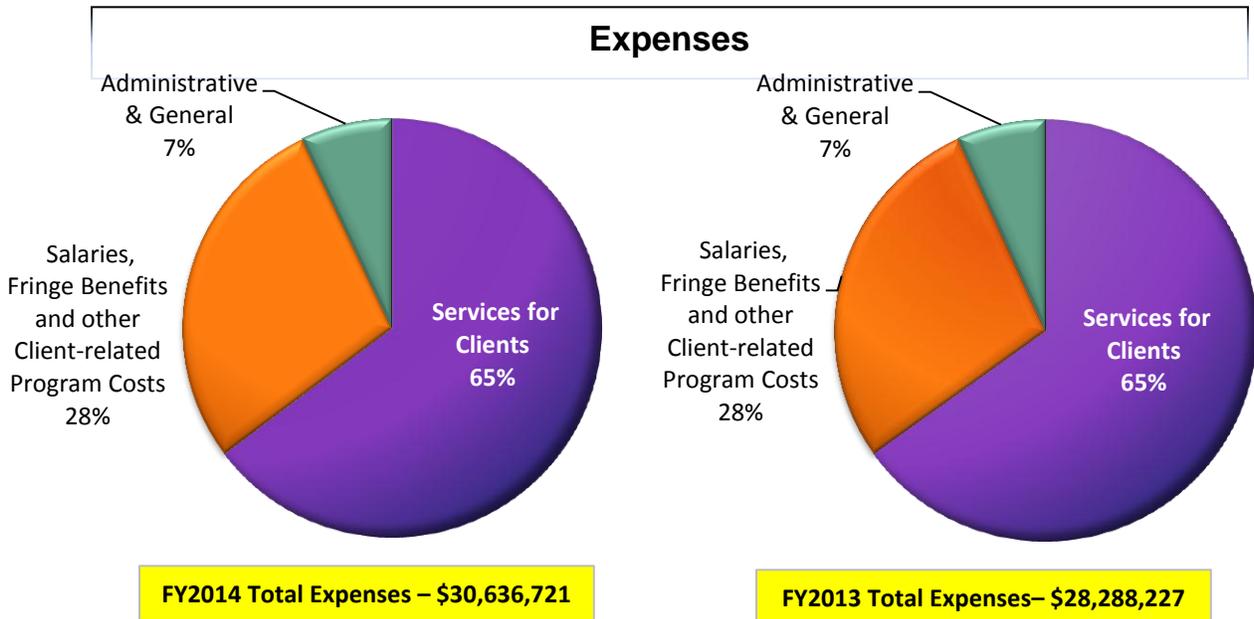
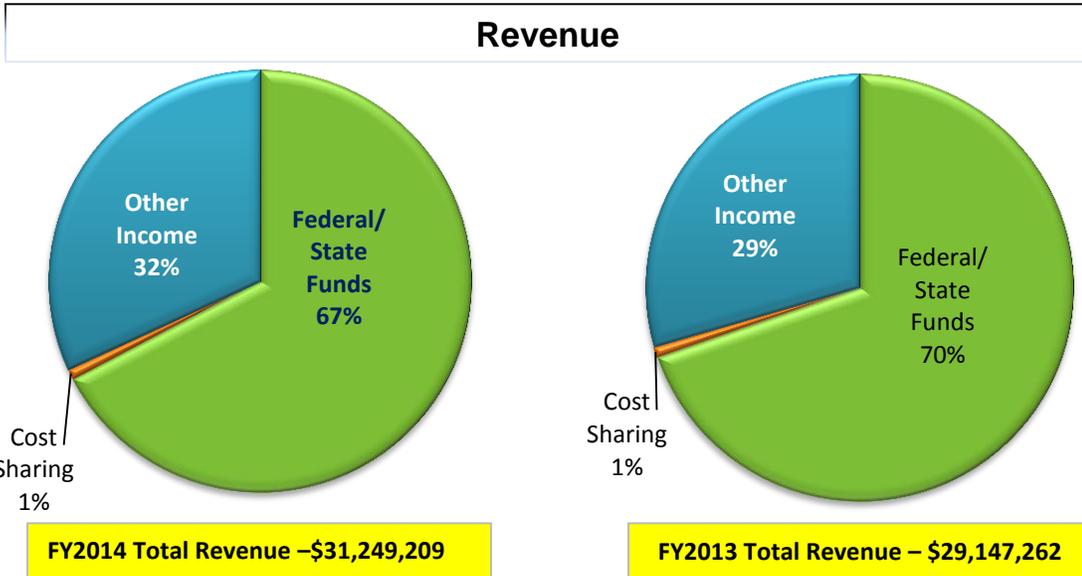
Special Thanks – Boston Senior Home Care wishes to recognize and thank the many generous Corporate Sponsors and Individual Contributors who have supported BSHC’s mission in many various ways throughout the year!

AARP	Jacqueline Pham	Meng Gen Yao
Adele Muzyka	James Poulos	Michael Trigilio–Associated Home Care
Aitza Quintana Feliciano	Jean F. Mattila	Miguel Ramirez
Alice Fisher	Jennie Sciortino	Mildred I. Lawson
Amy Conley	Joanne Peckarsky	Olympia Flower Store
Amy S. MacNulty	John & Janice Barlow	Paul K. Wong
Andre Dao	John A. Borgosano, Sr.	Peg Doyle
Andrew Brown–Career Ventures	John Harrington	Poh Meng Lee
Anthony Roberto & Rita Roberto–Spinelli’s	John J. Mann, Jr.	Ralph Reinherz
Barbara S. Karlin	John Langermann	Raymond H. Richard
Bertha Martins	Joseph Karaiskos	Richard E. Johnson
Boris Yablonovsky–Friendly Care	Joseph Kupwich	Richard & Claire Gusmini
Carol Sneider Glick	Josephine Ansaldi	Richard & Angela Faretra
Carolyn Sforza	Josephine Chiola	Robert & Ann Collier
Central Boston Elder Services	Judy Baker–ETHOS	Robert Guen, DMD
Charles Salvaggio	Jupiter Tang–Harbor Pacific Restaurant	Ruth Moy– Midtown Home Health & Greater Boston Chinese Golden Age Center
Charles W. Stavros	Kevin Hunter–Anodyne	Ruth Scully Hall
Christopher Hamilton	Lateisha R. Adams-Fineberg	Ruth Smith
Claire Hamel	Lawrence A. Peters	Sarah “Sally” Fogerty
Commonwealth Care Alliance	Leo Romero–Casa Romero	Senior Whole Health
David & Susan Pettit	Lily S. Chin	Shirley Siciliano
Denise Mayo	Linda O'Rourke	Solomon Sidell–South St. Diner
Dr. Gerald & Marian Lazar	Lola Tom	Stephen Man
Ellen J. Schwartz	Louis Giangregorio	Thalia D. Verros
Evelyne Lubin	Lynne Brilliant & Wanda Shelton	Tina Wang
Fallon Community Health Care/ NaviCare	Mai Quan Du	Tony DePasquale
Genci Naumi	Maria D. Alvarez	United Health Care
Gloria Santiago–Geriatric Home Health Care	Maria Malone	W. Karl Baker
Guiseppe & Josephine Chiola	Maria Palima	Wesley & Dorothy Clarke
Intercity Homemaker Services	Marianne M. Callahan	William & Mary Jane Restuccia –Family Foods
Irene O'Grady	Marie Cromartie	William P. Samuels
Isabella Lee	Mark & Joyce Biele	Zhi Ping Li
	Mary A. Maglio	
	Mary Gregorio	

Fiscal Operations – BSHC’s FY 2014 Fiscal Annual Audit was completed on schedule and the Auditor’s Report expressed an unqualified opinion and there were no findings. The Fiscal and Direct Service Departments worked in collaboration to implement billing procedures and processes for the One Care, Money Follows the Person, and the Tufts Senior Care Options Program.

Boston Senior Home Care Financial Results

[For the year ended June 30, 2014 with comparative Totals as of June 30, 2013]



BSHC's Board of Directors

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 Andrew S. Brown*Clerk/Secretary*

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 Ruth Smith
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 Lola Tom

Clients and Service Statistics FY 2014 FY 2013

Monthly Average Clients Served

Home Care Basic	1,655	1,622
Enhanced Community Options	140	131
Community Choices	316	320
Group Adult Foster Care	139	142
Adult Foster Care	110	82
Personal Care Attendant (PCA)	91	–
One Care	57	–
Senior Care Options (SCOs)	<u>3,299</u>	<u>2,949</u>
Total	5,807	5,246

Service Units

Adult Day Health hours	3,350	3,401
Boston ElderINFO referrals	6,444	4,212
Case Management hours	123,140	102,883
Grocery deliveries	3,592	3,477
Home-delivered meals	632,795	598,215
Homemaking and personal care hours	484,482	466,108
Laundry loads	22,165	19,133
Taxi, van, and chair car rides	48,242	23,900
Nursing screens	2,133	2,037

Total Cost of Client Purchased Services	\$19,832,685	\$18,420,237
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