

ANNUAL STEWARDSHIP REPORT
2013

OUR
GROWING
Family



PRESBYTERIAN
SENIOR LIVING



Nurturing



Past PSL Board Chairpersons (left to right, back to front): William Moyer; John Killian, Esq.; David Wolff; (seated) Rev. Maynard Grunstra and Philip Miller.

BOARD LEADERSHIP

On the wall of the Presbyterian Senior Living (PSL) administrative office is a large bronze plaque which lists the name of every person who has served as the chair of the organization since its inception in 1927. This list of 29 individuals is a testimony to the generations of board members and staff who have guided the organization through its history. Two verses of Scripture are listed above the names – one from the Old Testament and one from the New Testament:

The first are words from King Solomon in I kings 3:9 when he became the leader of Israel – So give your servant a discerning heart to govern your people and to know right from wrong.

The second are the words of Jesus taken from Luke 22:26 – Let the greatest among you become as the youngest, and the leader as one who serves.

This is the spirit that has guided the board and staff of Presbyterian Senior Living throughout its 87 year history. The Servant Leadership modeled by the PSL Board continues to shape the organization and its mission. Every generation of Board Leadership used their unique gifts to move PSL forward.



Past PSL Board Chairpersons with PSL's President & CEO, Stephen Proctor; (left to right, back to front) William Parham, Jr.; Ned Gardner; Stephen Proctor and George Tjiattas (front seated).

OUR GROWING FAMILY

Presbyterian Senior Living has been a dynamic and growing ministry for most of its history. As the number of seniors has grown and their needs have changed, PSL has adjusted to meet those expanding needs. This growth has continued through recent years in spite of adverse economic circumstances.

But growth is more than just increasing the number of persons served. For PSL it has been about reaching out to include more moderate to low income individuals, making progress toward achieving a balance in the economic level of persons served in independent living. Growth is also expressed by creating a broader range of services to assist persons to age in place. The evolution to person-centered care and a focus on the principles of Masterpiece Living to provide a superior quality of life experience throughout our entire continuum of care is another measure of growth.

From a PSL leadership perspective, what are the compelling reasons for growth?

Excellence. We grow to get better at what we do. It is our experience that organizations that are not growing in some tangible way become complacent and begin to decline. Excellence and growth are Siamese twins.

Size Matters. It takes growth to achieve the critical mass necessary to afford the technology and expertise to meet the evolving needs of seniors.

Future Security. PSL's growing diversity by geography, range of services, and sources of revenue provide a level of financial security that helps to assure that we will be able to fulfill the promise of future care to those who depend on us.

Serving Those in Need. As a not-for-profit organization we feel a special responsibility to provide greater amounts of subsidized care to those who lack the resources to afford the services they need and deserve. A healthy and growing organization is the engine that enables us to serve more people with limited financial means.



Ultimately PSL's growth is driven by the fact that people seek out life at Presbyterian Senior Living locations for themselves or the people they care about. The presence of medical and rehabilitation services, a safe and secure environment, the presence of good neighbors and caring staff, and the desire to spend more time on meaningful activities and relationships continues to draw people to this ministry.

This Annual Stewardship report focuses on the elements that have made this growth possible in the past and will likely determine the rate of growth in the future.

Ann Fedorchak, Chair
Tim Beaver, Vice Chair
Stephen Proctor, CEO



Encouraging

A ROBUST CONTINUUM OF SERVICES FOR SENIORS

Throughout our history the range of services provided by PSL has continued to expand. In 1970 the organization served less than 200 people in 8 personal care facilities, 17 individuals in one small skilled nursing center, and had 165 senior apartments at Presbyterian Apartments in Harrisburg. Starting in the 1970's, CEO Al Schartner and the Presbyterian Homes Board embarked on a program of expansion into skilled nursing care and opened our first continuing care retirement community. In the intervening years, six of the eight personal care facilities that comprised the core of the organization were closed or replaced because of building code and other related issues, and the 17 residents served in nursing were transferred to a larger facility. Only three of those original locations remain. These remarkable changes are the foundation of much of our success today.

The pace of change continues. Most recently the expansion of independent living residences has been extended with a goal to provide a balance of senior housing in Continuing Care Retirement Community (CCRC), market rate rental, and low to moderate income (HUD and Tax credit). The current mix of CCRC (1082), market rate rental (341), and affordable (983) reflect progress toward reaching that objective. The Shepherd's of Monroe County in Crestco, PA, an 84 unit tax credit project was added in 2013. The initiation of planning and construction of a tax credit project in Pittsburgh and a market rate project at Stadium Place in Baltimore will continue this momentum into 2014. Other projects in Easton, Oxford, and Lancaster are in various stages of development. Incremental expansion of CCRC units continues in several locations.

The integration of supportive services into the independent living environment to encourage aging in place is occurring throughout Presbyterian Senior Living. Other aspects of the continuum, skilled nursing and personal care, continue to have a strong following. The extension of clinical capabilities with the PSL staff has added to the type of persons served.



*Presbyterian Senior Living
continues to grow...*

A close-up photograph showing an elderly, wrinkled hand being gently held and supported by a younger, smoother hand. The background is a soft, out-of-focus green.

Caring

VOLUNTEERS

While many things have changed over our history, the critical role of volunteers has remained a constant. The various tasks of volunteers have grown proportionately with the organization over time.

Volunteers come from many different places to serve in this ministry. They include residents from our independent living, personal care, or skilled nursing center – where the idea of neighbors helping neighbors is clearly evident. Some volunteers are involved as an expression of their faith – reaching out to serve as an extension of their faith commitment through their church. Some are family members who began as volunteers when visiting a member of their family and continued well after their relative's time as a PSL resident. Some are friends and neighbors who view their volunteerism as a commitment to their community. Some are employees, who in their non-work hours return to give their time to the people they care about. Each of these groups of volunteers is a great blessing to us, and a critical part of creating the culture of care and compassion that we know as Presbyterian Senior Living. Altogether they contributed over 140,000 hours in 2013.



While we measure their work in terms of hours and type of activities performed, their influence on staff and the culture of PSL is immeasurable. We frequently refer them to the “leaven in the loaf”, a reference taken from the 13th chapter of the book of Matthew, where Jesus told a parable to describe the kingdom of God using two examples – a mustard seed and leaven. The point of the parable was that what the world may view as small and insignificant has a great impact on everything around it, growing and expanding until everything is changed. Specifically, the words of Jesus in Matthew 13:33 are as follows: “The Kingdom of Heaven is like leaven that a woman took and hid in three measures of flour, till it all was leavened.” This is a perfect illustration of the work of volunteers in the ministry of Presbyterian Senior Living.

At Presbyterian Senior Living, we consider our volunteers to be the key ingredient in our success – the leaven in the loaf. Volunteers influence everyone around them. They bring kindness, compassion, generosity, and a host of other virtues that penetrate into every facet of the organization and its work. When the commitment of volunteers is combined with the work of staff, church and community members, and the wonderful people we are called to serve, we have a perfect recipe. The final result is the creation of an environment where people feel they are loved and appreciated.





Helping

DEDICATED STAFF

The dedicated work of staff enables PSL to fulfill its mission of care and compassion. Open communication, visibility, transparency, fairness, and respect are the foundation stones of the PSL employee relations philosophy.

Over time the skill sets of staff are constantly upgraded and refined to meet the complex needs of seniors across the PSL continuum of care. Creating a learning environment is critical to a productive and fully engaged workforce. From pre-service orientation to advanced clinical training or improvements in technology, education becomes the key to the organization's success. Educational events are held at every PSL location and at the Learning Center in the PSL office in Dillsburg.

The PSL Board focused attention on internal Leadership development as the best way to assure long term success and strengthen PSL's values and corporate culture. A program to provide career development assistance and education to potential future leaders has been successful in this effort. Outside resources like the Leading Age and Leading Age, PA, Fellows in Leadership program has augmented internal resources.



COMMUNITY CONNECTIONS

The Community Benefit program of Presbyterian Senior Living consists of a variety of activities that help to fulfill PSL's mission and charitable purpose. This effort starts with providing services to seniors who lack the resources to pay for the care they need. The Community Benefit program also identifies and tries to alleviate unmet needs in the "external" community or surrounding neighborhoods where Presbyterian Senior Living facilities are located. Reaching to the wider community is not a marketing plan or a public relations effort designed to improve PSL's public image. The intent of the program is to extend the Presbyterian Senior Living mission to other individuals or organizations in need of support.

At PSL we believe that it is our obligation to make a tangible contribution to the social capital of the community surrounding our facilities by fostering relationships, networking or making connections with individuals and groups. These activities strengthen the fabric of the community and fulfill what we believe is our obligation to provide for the good of the community in order to justify our tax exempt status.

The full scope of the Community Benefit program is summarized in the Community Benefit Report, which is published annually and posted on the PSL web site. PSL individual locations are highlighted with specific outcomes and measurements of value in a variety of areas, including; education, community outreach, residents and staff volunteers, civic engagement, and benevolent support. A total of over 29 million dollars of community benefits have been identified for 2013.

...a variety of activities that help to fulfill our mission and charitable purpose.





Living

QUALITY OF LIFE

Masterpiece Living, an initiative that promotes successful aging, resident engagement and a more active community lifestyle continues to be a solid foundation for PSL's quality of life emphasis. Masterpiece Living encourages individuals to participate in an assessment that is used to establish a baseline and create tailored plans for each individual. The Masterpiece Living roll out continued at PSL CCRC campus locations, with each resident group putting its unique stamp on the Masterpiece Living concept. Kickoff events were in full swing during 2013. Regular meetings of Masterpiece Living champions from each location are held to exchange ideas and assist in making the Masterpiece Living journey effective in each setting.

The evolution of person-centered care in personal care and skilled nursing has been underway at PSL for a number of years. This includes a major reinvestment in our skilled nursing centers to reflect care being rendered in smaller neighborhood environments, with greater flexibility to meet the individual needs of those we serve.



In Indiana, Pennsylvania, St. Andrew's Village is in the middle of a \$10 million renovation that seeks not only to transform the physical setting, but to re-imagine its conceptual framework. The 31-year-old, 131 bed community will be transformed to include four smaller, distinct "households" – one for memory support, one for short-term rehabilitation and two for residents needing long-term residential care. St. Andrew's Village is taking its transformation a step beyond physical renovations and evolving its culture to fully operationalize the person-centered approach to care. A similar effort is underway at Westminster Village in Dover, Delaware, with construction to commence in 2014. It is expected that every PSL nursing facility will undergo this physical and cultural transformation.

The physical environment of care delivery is important, but it is just a beginning. Remodeling a community to add kitchens, dining, and social space into each household, making bathing spaces more private and adding more intimate living spaces are essential changes. But physical changes do not a household model make.

Staffing changes are among the most vital changes for this model to succeed. Traditional roles are changed so that staff can become more holistic caregivers – trained to meet needs instead of operating within the confines of outdated job descriptions. A single caregiver may now provide care to fewer residents, but in turn, their role expands to include more, such as providing assistance with bathing, administering medication or even helping baking cookies in the kitchen.





Ever-changing

ADJUSTING TO A CHANGING ENVIRONMENT

The challenge to every organization with a mission of providing services to seniors is how to adjust to a rapidly changing environment. While this has always been true to some extent, the changes in health care have been significant in the past few years. Terms like ACO's (Accountable Care Organizations), bundled payments, and improving community health outcomes are reflective of the nature and scope of these changes. To complicate matters further, the payment mechanisms are lagging well behind these emerging models of service delivery, creating conflicting incentives for change.

Presbyterian Senior Living is addressing the changing environment through a variety of initiatives internally and through discussions with other health care and housing providers. PSL's footprint covers a wide geographic area, so these discussions are taking place with many other groups. Presbyterian Senior Living's broad continuum of services creates an expanded vision of the possibilities for mutually beneficial relationships.

One example is a Care Navigation Program initiated in 2012 as a collaborative venture between PinnacleHealth and Presbyterian Senior Living at Presbyterian Apartments in Harrisburg. The program was designed following an assessment of the residents of the 165 unit apartment building, just a few blocks from the PinnacleHealth hospital. It found that residents were dealing with multiple chronic conditions and were frequent users of the emergency room and hospital.

Following the assessment, the PinnacleHealth Community Health Navigation Team was formed, consisting of a physician, a Registered Nurse and a Masters Level Social Worker who worked collaboratively with the Social Service Coordinator at the Presbyterian Apartments. Together, this team developed programs to help residents better manage their health care, improve their quality of life, and make better use of the health system's resources. The Navigation Team made sure that residents returning from an emergency department visit or hospital stay have everything they need for a successful transition, including prescriptions and other support services. To complement this follow up care the team

offered lunch and learn programs on topics such as diabetes to educate residents and help them manage their condition.

The program was put into place and residents began to access the weekly clinic services in July 2012. At the end of 2012 the program had realized a 20% reduction in emergency department visits and 49% reduction in hospitalizations. In 2013, the program continued to provide clinical services and expanded services to include assistance with monthly educational programs for residents. At the end of the first full year (12 months) of operation, the program had realized a 49% reduction in emergency department visits and a 70% reduction in hospitalizations.

The success of the program has attracted attention from a number of outside groups. Presentations at the Brookings' institute and Leading Age have highlighted the effectiveness of this partnership in realizing reduced costs and improved health and wellness for seniors. Sharon Kelly, PSL Trustee and PinnacleHealth staff member was a key to this collaborative effort. PSL administrative staff continue to work on other relationships that may bear fruit in the future.



Flourishing

MISSION SUPPORT

Presbyterian Senior Living operates under a set of stewardship principles designed to offer care and services to seniors across a wide economic spectrum. The delivery of services and the focus of the Mission Support program are designed to provide the greatest good to the greatest number of seniors within PSL's available resources.

Within the PSL continuum different levels of service vary in intensity and the amount of subsidy required. Skilled nursing has a high intensity with a relatively high subsidy per person. Personal Care has a lesser level of intensity and a higher relative subsidy per person. Independent Living has a lower intensity with a varying level of risk and subsidy based on whether it is a CCRC, Market Rate Rental, Tax Credit, or HUD supported model. Home and Community Based Services have various intensity and subsidy needs.



Generally speaking, the income stream from services delivered to seniors with the ability to pay should contribute a return commensurate with the risk to the organization to support PSL's mission to serve seniors with lower incomes.

The mission support efforts of the organization is multi-faceted, to support ongoing capital needs, subsidized care and support of endowment for future care needs. An active grant writing program has been effective to support specific programs throughout the organization.

In 2013, PSL raised \$2,757,325 from the following sources to support mission efforts:

- Planned Giving (including gifts through IRA's and charitable gift annuities) – \$101,373
- Bequests – \$800,807
- Other (including capital campaign commitments, annual giving, employee giving and special events) – \$1,268,871
- Auxiliaries – \$155,075
- Grants – \$662,496



PRESBYTERIAN SENIOR LIVING LOCATIONS

ALLENTOWN, PA
Westminster Village

BETHLEHEM, PA
Kirkland Village

BLOOMSBURG, PA
Westminster Place
at Bloomsburg

CRESCO, PA
The Shepherds

DILLSBURG, PA
CARROLL VILLAGE

Westminster Place
at Carroll Village

Moyer House

Schartner House

DOVER, DE
Westminster Village

EASTON, PA
The Easton Home

GLEN ARM, MD
Glen Meadows
Retirement Community

HARRISBURG, PA
Presbyterian Apartments

HOLLIDAYSBURG, PA
Presbyterian Village
at Hollidaysburg

HUNTINGDON, PA
Westminster Woods
at Huntingdon

INDIANA, PA
Grace Manor

St. Andrew's Village

LANCASTER, PA
The Long Community
at Highland

Westminster Place
at Long Community

MECHANICSBURG, PA
Silver Spring Courtyards
Silver Spring Gardens

MONTOURSVILLE, PA
Sycamore Manor
Health Center

NEWVILLE, PA
Green Ridge Village

ORBISONIA, PA
Woodland Retirement
Community

OXFORD, PA
Ware Presbyterian Village

PARKESBURG, PA
Westminster Place
at Parkesburg

PHILIPSBURG, PA
Windy Hill Village
Westminster Place
at Windy Hill Village

SCRANTON, PA
Geneva House

SHREWSBURY, PA
Shrewsbury Courtyards
Shrewsbury Courtyards II

ST. CLAIRSVILLE, OH
Mark H. Kennedy Park

STEWARTSTOWN, PA
Westminster Place
at Stewartstown

WAYNESBORO, PA
Quincy Village
Wesley House at Quincy Village

WILLIAMSPORT, PA
Presbyterian Home
at Williamsport

YORK, PA
Stony Brook Gardens
Springwood Overlook



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SENIOR LIVING

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OUR MISSION

The mission of Presbyterian Senior Living
is to offer Christian understanding,
compassion and a sense of belonging
to promote wholeness of body, mind and spirit.