

## **FY2019 Organization-Wide Annual Outcomes Summary** **Julie Lamberti, Director, Program Evaluation and Quality Assurance**

### **Organization Summary**

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North Shore Senior Center (NSSC) is an independent 501(c)(3) organization founded in 1956. Our organization offers a wide-ranging continuum of programs and services for older adults, adults with disabilities, and their families.

**Senior & Family Services (SFS)** offers in-home and community-based supportive services, primarily to economically disadvantaged older adults. **North Shore Senior Options (SO)** offers care management services, providing older adults and their families options to improve safety, well-being, and quality of life. **House of Welcome Adult Day Services (HOW)** offers specialized programs for persons with memory loss and their families. **Lifelong Learning (LL)** offers a variety of programs and classes.

The Center is governed by a 28-person board of directors with oversight by an Executive Director. The Leadership Team includes 10 department heads responsible for programs/services and business functions. Our staff is comprised of 120 employees. Additionally, hundreds of volunteers provide invaluable service, support and heart to our organization. Our annual budget exceeds seven million dollars.

In January of 2019, Tish Rudnicki became the Executive Director of North Shore Senior Center. Tish has dedicated nearly 30 years of her career to services for older adults and their families. Her warm and welcoming personality has been embraced by staff, board members, volunteers, participants and members. Her expertise and innovative leadership will ensure the organization's successful future.

## Organization Summary

North Shore Senior Center				
<b>Stakeholders</b>	Clients/Families, Members/Participants, Donors/Funders, Volunteers, Community Members, Referral Sources			
<b>Mission</b>	The mission of the North Shore Senior Center is to foster the independence and well-being of older adults, enhance their dignity and self-respect, and promote their participation in and contribution toward all aspects of community life.			
<b>Core Values</b>	Share a Purpose ♦ Embrace Diversity ♦ Take Responsibility ♦ Pursue Excellence ♦ Act with Passion			
<b>Programs: Service Delivery</b>	<b>North Shore Senior Center offers a continuum of programs/services for older adults, adults with disabilities, and their families.</b>			
	<b>Senior &amp; Family Services</b> <i>(in-home/community-based services)</i>	<b>North Shore Senior Options</b> <i>(care management and related services)</i>	<b>House of Welcome Adult Day Services</b> <i>(specialized programs for persons with memory loss)</i>	<b>Lifelong Learning</b> <i>(programs, community, connection)</i>
<b>Access Criteria</b>	<ul style="list-style-type: none"> <li>Persons who meet eligibility criteria based on each service/program</li> </ul>	<ul style="list-style-type: none"> <li>Older adults and families in need of care management and related services</li> <li>Services are fee-based</li> </ul>	<ul style="list-style-type: none"> <li>Persons with memory loss and their families</li> <li>Varies by program</li> </ul>	<ul style="list-style-type: none"> <li>Older adults who are independent or able to provide for their own care</li> </ul>
<b>Persons Served</b>	<ul style="list-style-type: none"> <li>Older adults, adults with disabilities, and their families</li> </ul>	<ul style="list-style-type: none"> <li>Older adults and their families</li> </ul>	<ul style="list-style-type: none"> <li>Persons with memory loss and their families</li> </ul>	<ul style="list-style-type: none"> <li>Older adults</li> </ul>
<b>Services</b>	<ul style="list-style-type: none"> <li>Adult Protective Services (APS)</li> <li>Older Adults Benefits Program</li> <li>Caregiver Program</li> <li>Case Management (CM)</li> <li>Choices for Care</li> <li>Grandparents Raising Grandchildren Program</li> <li>Illinois Department on Aging (IDOA) Community Care Program (CCP)                             <ul style="list-style-type: none"> <li>MCO DOE (determination of eligibility)</li> </ul> </li> <li>Information and Assistance (I&amp;A)</li> <li>Lending Closet</li> <li>Options Counseling</li> <li>Support Groups (Caregivers, Hearing Loss, Low Vision, Parkinson's Disease)</li> <li>Wellness and Fitness Groups</li> <li>Community Education</li> <li>Services generally available weekdays, 9 a.m. to 5 p.m.</li> </ul>	<ul style="list-style-type: none"> <li>Care Management</li> <li>Daily Money Management</li> <li>Behavioral Health                             <ul style="list-style-type: none"> <li>Psychotherapy</li> <li>PEARLS</li> </ul> </li> <li>POA for Healthcare/Property</li> <li>Guardianship of Person/Estate</li> <li>Services available M-F, 9a-5p, with 24/7 services available to contracted ongoing support clients</li> </ul>	<ul style="list-style-type: none"> <li>Day Program</li> <li>Early Memory Loss Programs                             <ul style="list-style-type: none"> <li>Mind Matters group program</li> </ul> </li> <li>Supportive case management</li> <li>Alzheimer's Family Support Group</li> <li><b><i>Alzheimer's Caregiver Manual</i></b></li> <li>Services available M-F, 8:30a-4p</li> <li>Memory Café <i>(in collaboration with Senior &amp; Family Services and Senior Options)</i></li> </ul>	<ul style="list-style-type: none"> <li>Programs                             <ul style="list-style-type: none"> <li>Educational</li> <li>Enrichment</li> <li>Fitness &amp; Health</li> <li>Social &amp; Recreational</li> </ul> </li> <li>Community                             <ul style="list-style-type: none"> <li>A place where older adults find a community of peers</li> </ul> </li> <li>Connection to a broad range of services</li> <li>Programs offered M-F, 9a-4p, with special events weekends and evenings</li> </ul>
	<ul style="list-style-type: none"> <li>Professional &amp; Community Education</li> </ul>			
<b>Business-Administrative Functions: Support Service Delivery Programs</b>				
<ul style="list-style-type: none"> <li>Executive Director &amp; Leadership</li> <li>Development</li> <li>Marketing &amp; Communications</li> <li>Facility Operations</li> <li>Finance</li> <li>Human Resources</li> <li>Program Evaluation &amp; QA</li> </ul>				

## Year in Review

North Shore Senior Center is committed to providing programs and services that are of high quality, reflect best-practices, and demonstrate leadership in the field of aging. Our reputation for excellence is well-known and valued. Quality improvement is an ongoing process, requiring each of NSSC's Departments to evaluate its programs and services through its Annual Outcomes Report/Department Measurement-Management-Improvement Plan. Business and administrative functions are also addressed relative to their impact on service delivery. The information/results obtained are reviewed and analyzed to ensure that we are meeting the needs of persons served; providing accessible, efficient, effective and satisfactory services; and addressing areas for improvement. Results are shared with stakeholders in a variety of ways.

### Process for each program/area of service delivery

- Data collection ongoing throughout fiscal year
- September: draft reports prepared for September Department Staff Meetings to review and develop performance improvement plan with next year's targets
- October: reports published
- Share with stakeholders

### Accreditations

- CARF Accreditation is an independent, voluntary process documenting that the services reviewed meet "internationally recognized standards of quality in the provision of outcomes-driven programs and services to enhance the lives of the persons served"
  - Adult Day Services, Senior & Family Services and North Shore Senior Options, as well as organization business practices, are subject to review
  - A three-year accreditation, the maximum possible, was awarded in April 2018, the sixth consecutive time
- The National Institute of Senior Centers (NISC), part of the National Council on Aging, conducts an accreditation review every five years, evaluating our Lifelong Learning Department programs, activities and business practices
  - The review is based on NISC's standards of excellence for senior center operations, including outcomes-based evaluations
- Completed NISC accreditation process and 5-year accreditation awarded July 2019

### FY2019 Organization-Wide Highlights

- **20,916** unduplicated persons served/**139,687** hours of service provided through
  - Senior & Family Services (SFS)
  - Senior Options (SO)
  - House of Welcome Adult Day Services (HOW)
  - Escorted Transportation Service (ETS)
  - Tax Assistance
  - **81%** of persons served were at the level of poverty to low income
  - Achieved **93%** average satisfaction from respondents to surveys of persons served in the above programs
- **2832** unduplicated persons served/**628** classes/**18,533** enrollments provided in Lifelong Learning
  - Achieved **91%** average satisfaction from respondents to the annual outcomes survey
- **86 cents** on the dollar was used for programs/services for persons served
- Volunteers provided **15,997** hours of service across the organization, which translates into **8.8** fulltime employees
- **2111** persons attended **63** community education programs with **96%** of survey respondents expressing satisfaction
- **140/174** or **80%** of service delivery outcome targets met or exceeded expectations
- Achieved **93%** average satisfaction of respondents to all surveys sent organization-wide

## Senior & Family Services

### Year in Review

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#### Significant Events

- Assisted 570 households to receive \$283,342 through the LIHEAP program.
- APS received a record breaking number of reports 351 this year, resulting in 308 investigations
- Our interns and Caregiver Specialists introduced a Memory Café in conjunction with Center of Concern
- The APS team incorporated Self-neglect cases into the program

#### Personnel Accomplishments

- 4 staff members became Licensed Clinical Social Workers

#### Future Plans

- Mentor for new CEDA site
- NSSC and Center of Concern have agreed to run independent Memory Café's starting in October 2019
- The NSSC Memory Café will be a collaboration of Senior and Family Services, House of Welcome and Senior Options

#### Outcomes

- **Effectiveness**
  - Level of risk to older adults receiving Adult Protective Services was reduced in 69% of cases
  - Only 2.69% of CCP/CM clients had a long-term nursing home admission, which is well below the CMS statistics for adults 65 and older of 3.4%
  - Results of the *Grandparents Raising Grandchildren* program survey were 96% positive
  - 2 internships provided, with 100% successful completion
- **Efficiency**
  - 20,458 unduplicated persons were served in 38 Senior & Family Services programs/services
  - 75,502 hours of service were provided
  - 76% of staff time was spent in direct client-related activity
  - Per client cost across all programs was \$212
    - Average hourly cost was \$58
    - Portion of costs covered by program revenue was 68%
    - Portion of costs covered by all revenue was 91%
  - Volunteers provided 3741 hours of support
- **Service Access**
  - Audits by AgeOptions and the Illinois Department on Aging met expectations
- **Satisfaction**
  - 89% of support group survey respondents were satisfied with services provided
  - 94% of Information & Assistance survey respondents were satisfied with services provided
- **Targets Achieved**
  - 38/44 or 86% of outcome targets were met or exceeded

## North Shore Senior Options

### Year in Review

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#### Significant Events

- Expanded service area to include parts of Lake County
- Enrolled first two Guardian of the Estate clients
- Enrolled first POAs for Healthcare and Property clients
- Initiated social work and psychotherapy services to Belmont Village-Glenview
- Began including outcomes surveys to Daily Money Management and Behavior Health clients
- Achieved 19.7% billable revenue growth

#### Personnel Accomplishments

- Two team members obtained LCSW licenses
- Recruited a part-time Daily Money Manager
- Team member completed training/certification necessary to roll out Dementia Counseling in collaboration with the House of Welcome

#### Future Plans

- Current director resigned effective October 31, 2019
- There will be a transition to a new director
- Strategic reorganization of the department

#### Outcomes

- **Effectiveness**
  - 100% of care recipient/family member survey respondents agreed that
    - Their stress was reduced
    - Identified needs were met
    - Services were beneficial for them
    - Services help them remain at home
  - Client falls, ER visits and long-term nursing home placement were well below national averages for persons 65 and older
- **Efficiency**
  - 382 unduplicated persons were served
  - 5075 hours of service were provided
- **Service Access**
  - 100% of care recipient/family member survey respondents agreed that services were provided in a timely manner
- **Satisfaction**
  - 100% of care recipient/family member survey respondents agreed expressed overall satisfaction with services provided
- **Targets Achieved**
  - 41/45 or 91% of outcome targets were met or exceeded

# House of Welcome Adult Day Services

## Year in Review

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### Significant Events

- We hosted exhibits of participant artwork at the Winnetka/Northfield Public Library and in the gallery space at the Center
- Hired three new staff members

### Personnel Accomplishments

- One staff member was promoted to Program Coordinator
- One staff member completed training to become certified through the Alzheimer's Poetry Project

### Future Plans

- Launch a Memory Café at the Center in collaboration with other departments
- Update marketing materials
- Initiate planning for future extension of Day Program hours
- Review caregiver support programs
- Research technology options to help streamline processes

### Outcomes

- **Effectiveness**
  - Well-being of DP/MM participants was supported as measured by daily activity charting
  - DP caregiver stress was reduced, participants benefitted by attending, and family caregivers benefitted by having their loved attend, as measured by the adult day services questionnaire
  - 93% of MM participant survey respondents reported that attending the program was beneficial to them
  - 97% of MM family member survey respondents reported positive benefits from their loved one attending the program
  - DP participants continued living in the community for an average of 21 months
  - MM participants continued living in the community for an average of 22 months
  - 2 internships provided with 50% successful completion
- **Efficiency: 58,764 hours of service provide to 590 persons**
  - 76 participants were served in the DP
    - 51,998 hours of service were provided
  - 28 participants were served in MM
    - 4880 hours of service were provided
  - Alzheimer's Family Support Group average attendance, 15
  - MM Family Support Group average attendance, 4
  - Per diem cost across all programs was \$145
  - Hourly cost was \$20
  - 57% of budget was covered by service fees
  - Volunteers contributed 4677 hours of service
- **Service Access**
  - 47% DP/MM referrals completed enrollment
  - 18% of DP/MM participants received funding assistance through the sliding fee scale and the VA
- **Satisfaction**
  - 96% of DP, 91% of case management, and 89% of AD support group survey respondents expressed satisfaction with services
- **Targets Achieved**
  - 38/57 or 67% of outcome targets were met or exceeded

# Lifelong Learning

## Year in Review

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### Significant Events

- Expanded our science and environmental education programs with very high quality instructors. Enrollments have been increasing, and these classes have been praised for their relevance and educational value
- Super Senior Day was outstanding – new cross-departmental team was formed, which gave a sometimes fresh approach to the entire event and expanded awareness about the event
- Refocused the Art Gallery to highlight more of our own artist's work, featuring shows for individual artists or displaying work by different groups, such as the Photography Club and The students in Carl Koch's Art Workshop. Also expanded applied arts programming.
- Completed NISC accreditation process and 5-year accreditation awarded July 2019

### Personnel Accomplishments

- Director attended LERN's Leadership Institute
- Adding one Program Manager position in Fall 2019
- Focused on enhancing customer experience

### Future Plans

- Working with the Director of Common Ground to add their instructors and programs to our schedule beginning Fall 2019, after Common Ground ceases operation
- Expand early evening programming in 2020
- Expand/enhance the Shop's merchandise selection and sell items online

### Outcomes

- **Effectiveness**
  - Achieved 91% average agreement from respondents to the annual outcomes survey regarding effectiveness of LL programs in increasing knowledge/skills and socialization, improving health and outlook on life, maintaining independence; overall customer satisfaction was 99%
  - Program quality score was 4.8 out of 5, based on participant evaluation of each new class offered
  - Achieved 91% average agreement from respondents to the annual survey regarding effectiveness of Fitness Center services in maintaining/improving confidence in performing activities of daily living, achieving fitness goals and improving quality of life
- **Efficiency**
  - 18,533 enrollments/628 classes
  - \$120,194 of program revenue was generated per FTE staff member
  - Operating margin was 57%
  - Cancellation rate was 7%
  - Customer repeat rate was 60%
  - Per person cost across all programs was \$418
    - Portion of costs covered by program revenues was 45%
    - Portion of costs covered by all revenue was 69%
  - Volunteers provided 7074 hours of support
- **Service Access**
  - 100% of scholarship applications were awarded
  - 147 participants on waiting lists for 31 classes
- **Satisfaction**
  - 90% of respondents to the tri-annual Lifelong Learning survey in FY2016 expressed satisfaction
    - Will be repeated in FY2020
- **Targets Achieved**
  - 23/28 or 82% of outcome targets were met or exceeded

## **Business-Administrative Functions/Other**

<ul style="list-style-type: none"> <li>• Measured/analyzed, i.e., written analysis of business function performance indicators in relation to performance targets</li> <li>• Operational challenges that may not be specific to a program, e.g., HR, Technology Plan, Budget, Strategic Plan, Accessibility Plan, Fundraising</li> <li>• Key objectives identified by the organization as supporting service delivery improvement</li> </ul>		
<b>Business-Administrative Functions/Other</b>	Accessibility Plan	<ul style="list-style-type: none"> <li>• Departments included in organization-wide Accessibility Plan</li> <li>• Reviewed/approved January 2018</li> </ul>
	Strategic Plan	<ul style="list-style-type: none"> <li>• Departments collaborate on Strategic Planning process</li> <li>• Plan established through FY2022</li> </ul>
	Budget will meet organization needs	<ul style="list-style-type: none"> <li>• Departments collaborate with Executive Director and Finance Department on developing and monitoring annual budget</li> </ul>
	Subsidize revenue gap in budget	<ul style="list-style-type: none"> <li>• Departments' needs included in the Development Department's annual fundraising plan</li> <li>• Executive Director, Leadership Team and Staff collaborate with fundraising efforts in a variety of ways throughout the year</li> </ul>
	Marketing efforts will support organization programs and services	<ul style="list-style-type: none"> <li>• Departments' needs included annual Marketing plan</li> <li>• Executive Director, Leadership Team and Staff collaborate with efforts to market programs and services in a variety of ways throughout the year</li> </ul>
	IT needs are met	<ul style="list-style-type: none"> <li>• Outsourcing of IT being reviewed</li> <li>• Departments included in IT plan</li> </ul>
	Critical incidents will be addressed/tracked/analyzed	<ul style="list-style-type: none"> <li>• Incident Report Tracking System maintained</li> </ul>
	Feedback will be addressed/tracked/analyzed	<ul style="list-style-type: none"> <li>• Feedback Tracking System maintained</li> </ul>
	Maintain/support qualified staff and volunteers	<ul style="list-style-type: none"> <li>• Human Resources supports/collaborates with all Departments in recruiting/supporting qualified staff and volunteers</li> </ul>