



**Services for Adults
Staying in Their Homes**

ANNUAL REPORT
January 1, 2011 — December 31, 2011

We make living easier.



SASI supports the efforts
of older adults to remain
in their homes.

Services for Adults Staying in Their Homes
(SASI)

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www.SASlathome.org

*SASI is a 501(c)(3) nonprofit organization licensed by IDPH
as a Home Services Agency and a Home Services Placement Agency.*

Formerly known as Seniors Action Service, Inc.

Dear Friends

SASI continues to grow and to further establish our agency as a vital source of support to families and individuals in the many communities we serve. Our expanded number of programs and service hours to clients required us to step back and evaluate how SASI will accommodate our rapid growth. In late 2011, the Board formed a Business Plan Task Force to assess, secure and allocate SASI's resources. Comprised of Board members, volunteers and staff, the task force carefully deliberated about our options and presented a challenging Business Plan to the Board. The Board approved it unanimously. Then the hard work of implementing the Plan's objectives began.

Fortunately, we continue to have substantial support in reaching our objectives. Most important is SASI's Board. We would like to express our gratitude to our Board and to our Board Committees. We especially are grateful to those who left the Board this past year after so many years of dedicated service and who are still committed to ensuring that SASI fulfill its mission. We are fortunate to have welcomed new Board members who wasted no time in committing themselves to advance SASI's goals.

Two years ago, we formed a Board of Advisors to share their professional expertise, support our fundraising benefit—the Ruby Slipper, and to help us spread the word about SASI.

SASI was fortunate to participate in Northwestern University's Kellogg School of Management Board Fellows program. Fellow Meghan Taylor's contributions to Board development and the agency were invaluable. We look forward to having other Fellows in the future.

We are grateful to all those who show their faith in SASI by continuing to make referrals to us. These individuals and organizations have contributed significantly to our growth.

SASI has donors both old and new who make it possible for us to continue to help older adults remain in their homes. They support us as donors to our annual appeal and other fundraisers; as referral sources; as volunteers and guests at our "Celebrating Experience" art gallery openings and the Ruby Slipper benefit; and in so many other important ways.

Our hard-working administrative and caregiving staff always put the needs of our clients and their families first. Without their dedication, there would be no SASI.

We thank all of you for making 2011 a successful year for SASI. We look forward to your partnership as we continue to serve our communities in 2012.

Ellen Browne Marie O'Connor



Ellen Browne
Board President



Marie O'Connor
Executive Director

What We Do

We make living easier.

SASI...

... **helps adults** continue to live in their homes and maintain their sense of dignity and connections to friends, neighbors and community as they manage challenges due to aging, illness or injury.

... **is a steadfast, trusted resource** providing affordable and reassuring means to stay home. SASI recognizes the emotions involved—of those who receive care and their family and friends—and offers compassion and professionalism during a challenging time.



“ My caregiver spares my daughters the anxiety of having to ask ‘will my mom be safe?’ ”

Services include:

- ◆ providing caregivers to clients who desire agency-supervised care
- ◆ placing caregivers with clients interested in supervising their own care
- ◆ in-home administrative help for people unable to perform clerical tasks independently
- ◆ preparing the home for client's return after a stay in the hospital or rehabilitative facility
- ◆ screening applicants for those who wish to hire help at home directly

Who We Help

SASI helps adults recovering from a temporary setback or living with the ongoing challenges of aging or medical conditions. Many clients live with chronic conditions such as Alzheimer's or other dementia, Parkinson's, depression, cancer, MS or other health challenges.

A client's preference for how care is given is as important as his or her medical situation.



Recognizing client choice defines SASI and its relationship with older adults. Many times other people—family members or neighbors, powers of attorney, social workers and geriatric care managers—are also involved with helping manage an older person's care. Staff works with each party to ensure that proper care and respect are given.

*SASI assisted more than 160 clients
in 2011.*

*SASI helped nearly 1,000 clients
in the past five years.*

SASI serves Chicago, north/northwest Cook County and southern Lake County communities.

Clients by City—2011: Arlington Heights, Chicago, Evanston, Glenview, Highland Park, Kenilworth, Lincolnwood, Morton Grove, Niles, Northbrook, Northfield, Park Ridge, Skokie, Wilmette, Winnetka

The SASI Advantage

- **Higher caregiver standards**

The State of Illinois requires 8 hours of caregiver training and a one-time physical; SASI provides 12 hours of training and requires an annual physical.

- **No minimum service hour requirement**

Most caregiving agencies require a minimum of 4 consecutive hours of care; SASI allows clients to schedule the number of hours they need when they need them.

- **Exceptional caregiver retention**

The annual retention rate in the home caregiver industry is 30%; SASI's rate is 85%.

- **Unique, affordable single-fee programs**

In response to our clients' needs, SASI has created several unique services, including post-rehab returning home preparation and caregiver screening.

- **Client well-being visit within the first 30 days**

SASI exceeds state standards: the Illinois Department of Health (IDPH) requires visits within 90 days.

Caregiver Training

SASI respects our clients' abilities to make choices and decisions and wants caregivers who encourage and support the people with whom they work. Although the Illinois Department of Public Health requires 8 hours of training annually, SASI requires 12 hours of training a year.

Caregiver job training remains vital to our agency. Training topics in 2011 included: Mental Health and Aging, Normal Aging and Chronic Conditions (such as arthritis and heart disease), The Art of Jewish Caregiving, Vision Loss, Nutrition, Fall Prevention, Infection Control, Parkinson's Disease and Progressive Supranuclear Palsy, Non-Alzheimer's Dementias and ALS.



e Do It

Referral Sources

SASI has relationships with a variety of service providers for older adults. Many referrals are from other organizations that serve seniors and their families. SASI also appreciates our many former and current clients who recommend SASI to their friends, neighbors and loved ones.

Social Service Agencies	25%
Word of Mouth	30%
Medical Institutions	20%
Other	20%



- SASI offers services that are affordable to older adults who may otherwise be underserved.
- SASI values a customer service culture that is extremely attentive to older adults' needs.

Our services are strengthened by dedicated...

Board Members

Who shape and guide the agency and its philosophy.

Caregivers

SASI continues to increase the number of agency-employee caregivers to meet the needs of our growing number of clients.

Community Members and Agencies

Both individuals in the community and area professionals recommend SASI services to hundreds of people throughout Chicago and the suburbs.

Staff

Who screen and train caregivers, manage client intake, place appropriate caregivers with clients, and emphasize customer service and client satisfaction.

Who Helps Us

Friends at Special Events help raise community awareness and necessary funds for SASI.

SASI's annual benefit, **"The Ruby Slipper Event: There's No Place Like Home"** is our signature fundraiser. The festive celebration reflects our commitment to honoring older adults.

John Macsai was honored at the 2011 benefit for his professional and personal commitment to older adults. State Senator Jeff Schoenberg served as the Event Honorary Chair.

"Celebrating Experience," SASI's quarterly art exhibit, features the work of older adults. Our 2011 exhibits included paintings by Lowell Goone, Essie Landsman, John Macsai, John Martin and Sally Schoch; textiles by Mary Jo Bowers; and paintings and drawings by Patricia Schuler.

SASI made new friends at these community events:

- ◆ "A Fair to Remember" boutique
- ◆ "Ethics and Elderlaw" with Jan Dutton, JD
- ◆ "Celebrating Experience" Gallery
- ◆ "Caring for Someone with Alzheimer's" program
- ◆ "Music at Mallinckrodt"
- ◆ Evanston "Aging Well" Conference

We thank you, our dedicated donors, whose support strengthens SASI's ability to help people age in place. Funders, in-kind donors, individuals, volunteers—YOU are all essential partners in fulfilling our mission.

Funders

Anonymous
 New Trier Township
 Woman's Club of Evanston

Matching Gifts

Retirement Research Foundation

Volunteers

Kurt Fleschig	Beth Lange	Brooke Ramsey
Jeanne Fox	Aidan Lucas	Joe Ross
Cathy Grever of GoDesign	Peter Lucas	Emily Segal
Jack Hickey	Naja Maltezos	Julia Segal
Karen Jensen	Gay Menges	Susan Stevens

Corporate Friends

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Irmco Properties &		

In-Kind Donors

Thanks to the many in-kind donors and volunteers who made the "Ruby Slipper" event successful, including video team Kate Wrobel, Jill DiBiase, Jack Hickey, Mark Pallman and Lauren Pecorella; and:

Adventure Stage	Michele Daniels	Great Harvest
Allgauer's on the Riverfront	Marcia Danits	Cathy Grever of GoDesign
Ayla's Originals	Doubletree by Hilton	Peter Hanig
Ardath Berliant	Ed Debevis	Hilton Garden Inn
Ellen Browne	Edwardos	Home Made Pizza
CHICAGO a cappella	Evanston Athletic Club	Mindy Horne
Chicago Cubs	Evanston Golf Club	Karen Hunt
Chicago Line Cruises Ltd.	Gavin	Illinois Holocaust Museum
Chicago Shakespeare Theater	Gethsemane Garden Center	Jacky's on Prairie
Don Crost and Buffy LaBahn-Walgreen	Bill and Carolyn Gifford	Michael Kerns
D&D Finer Foods/DD Dogs	Gilson's Food & Wine Bar	Stan Leimer
	Gino's East	Lettuce Entertain You

In-Kind Donors (cont.)

Light Opera Works	Perennials	SheBeads
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Peter Lucas	Prairie Moon	Spice House
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Peter McGuire	Ravinia	Stella
MilliFiori!	ReDefined Fitness & Physical Therapy	Steppenwolf Theatre Company
Phyllis Mitzen	Rembrandt Players Chamber Group	Susan Stevens
Music Box Theatre	Joyce Robbins	The Bagel
Music Institute of Chicago	Miriam Romain	The BIG Picture Home Theater Co.
Next Theatre	Dorothy Rosen	The Evanston History Center
North Shore Village	Max Rosen	The Exercise Coach
Northlight Theatre	SASI Benefit Committee	Trattoria D.O.C.
Northwestern University Athletic's & Recreation	SASI Board of Directors	Trump International Hotel & Tower
Notice	Sen. Jeff Schoenberg	Union Pizzeria
Accessories for Living	Ann and John Searles	Universal Studios
Marie O'Connor	Barry Segal	Laura Washington
Oak Park Festival Theatre	Emily Segal	Barbara Wertico
Oceanique	Gary and Sue Segal	Wilmette Theatre
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		Yoshi's Café.

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Timeline

Mid-1970s	Evanston Mayor and United Way Executive Director Edgar Vanneman help form the New Generations Services Board enabling older adults to increase their incomes and expand their purchasing power. United Way administers a job finding program and a senior citizen discount program in cooperation with local merchants.
1975-1976	Seniors Action Service, Inc. (SASI) is formed with partial funding from United Way. It continues helping workers 60 and older gain employment after retirement or layoffs. It also creates, with the help of over 80 volunteers, "Discount Directory," a list of Evanston merchants for the community's older adults.
1977-1987	SASI places 1600+ older adults in general office, accounting, public relations, bookkeeping, home maintenance, home companion and other employment positions.
1983	<p>SASI creates the Caring Home Aid Program (CHAP) to meet the growing demand for older adult home care services. The program includes caregiver training, employment of seniors as caregivers, and direct discounts to seniors from local merchants.</p> <p>The Discount Directory is discontinued due to the large number of volunteer hours required to produce it and merchants' increasing reliance upon individual discount offers.</p>
1995	SASI focuses on placing caregivers 45 years old and older in the homes of older adults who need assistance.
2000	SASI contracts with CJE SeniorLife and other experts on aging to develop the EXCEL (Excellence in Eldercare Education and Employment) training program to prepare individuals to become caregivers. Over 80 individuals complete the program before it ends in 2005.
2009	<p>SASI's Board approves doing business as "Services for Adults Staying in Their Homes" (SASI) to better reflect the agency's mission and programs.</p> <p>SASI begins to employ caregivers and receives licensure from the Illinois Department of Public Health as a Home Services Agency and Home Services Placement Agency.</p>
2010-2011	SASI expands services to include Home Readiness, Caregiver Screening and Administrative Assistance.

FISCAL YEAR AUDIT JANUARY 1, 2011 – DECEMBER 31, 2011

Statement of Activities of Seniors Action Service, Inc. DBA Services for Adults Staying in Their Homes

REVENUE AND PUBLIC SUPPORT	
Individual contributions	\$ 51,398
Foundations, corporations and local government	37,028
Program fees	288,315
Processing caregivers	2,150
Special events	73,075
Interest income	67
Net assets released from restrictions	0
Total Revenues and Other Support	\$ 452,033
EXPENSES	
Program	322,066
Management and general	37,236
Fundraising	68,240
Total Expenses	<u>427,542</u>
CHANGE IN NET ASSETS	24,491
NET ASSETS	
Beginning of year	81,463
End of year	\$ <u><u>105,954</u></u>

Financial Statements of Seniors Action Service, Inc. DBA Services as Adults Staying in Their Homes Statement of Financial Position December 31, 2011

ASSETS	
Cash and cash equivalents	\$ 80,644
Accounts receivable	18,954
Pledges receivable	900
Grants receivable	2,335
Prepaid expenses	1,245
Unemployment savings account	1,914
Rent deposits	3,406
Property and equipment	9,812
Total Assets	<u>\$ 119,210</u>
LIABILITIES	
Account payables	\$ 944
Accrued expenses	12,312
Total Liabilities	<u>13,256</u>
NET ASSETS	
Unrestricted	103,619
Temporarily restricted	2,335
Total Net Assets	<u>105,954</u>
Total Liabilities and Net Assets	<u><u>\$ 119,210</u></u>
Functional Expenses as percent of total expenses	
Program	75%
Management & General	9%
Fundraising	16%

2011 Board of Directors

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