



**Services for Adults  
Staying in Their Homes**

**ANNUAL REPORT**  
**January 1, 2012 — December 31, 2012**

*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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*SASI is a 501(c)(3) nonprofit organization licensed  
by the Illinois Department of Public Health (IDPH)  
as a Home Services Agency and a Home Services Placement Agency.*

Formerly known as Seniors Action Service, Inc.

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## Dear Friends

We will remember 2012 as the year SASI exceeded our own and everyone else's expectations. With an emphasis on delivering more service hours, SASI continued the growth started in 2009 when we began the transition from a home services placement agency to a home services agency providing direct services. This year, we delivered over twice as many hours of service to older adults than we did in 2011. This type of growth has put more demands on our staff and Board. For example, SASI had to hire and train more caregivers, and the Board stepped up financially to support this expansion.

Our 2012 Ruby Slipper honoree was Dr. Martha Twaddle, Chief Medical Officer of the Midwest Palliative and Hospice CareCenter (MPHCC). It is important that SASI partner with organizations like the MPHCC, not only to grow but also to serve those most in need by helping them stay at home. By honoring Dr. Twaddle, we have strengthened our two organizations' relationship.

As we continue to grow, we must remember what makes SASI special. We are a community-based organization that strives to maintain extraordinary and affordable care in a highly competitive industry. We are committed to quality: SASI goes beyond the state's home services licensure mandate by requiring 16 hours of training annually, rather than just eight; well-being visits to new clients within the first 30—not 90—days; and annual TB testing for our caregiver staff. In addition to maintaining high standards of care, SASI remains overall the most affordable agency in our area, according to our annual survey of local home services agencies.

Our clients best describe the SASI advantage. "We feel very fortunate that SASI provides home care that is both exceptional and affordable," a client's family member writes. "SASI has helped us more than any friend or family member could have...."

Exceptional, affordable care and expanding services would not be possible without your contributions. Home services agencies are not eligible to receive Medicare dollars. SASI is therefore totally dependent on the support of our friends, such as those who participate in the Ruby Slipper event, SASI's annual fundraising benefit. We are pleased to report that the 2012 Ruby Slipper exceeded past years by raising an all-time high of \$84,000. We thank the Ruby Slipper Committee, the Board and all our supporters who made this success possible.

We are most grateful to each and every one of you, our friends, for your generous support. As SASI continues to face the challenges that come with growth, we hope that we can count on you to walk with us every step of the way into the future, starting with 2013.

*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.



*“SASI made caring for my mother at HOME possible while I continued to work. Your costs are reasonable in an industry where much of the quality care comes at an exorbitant cost that puts it out of reach for average families.”*

## Services include:

- ◆ providing caregivers to clients who desire agency-supervised 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
- ◆ placing caregivers with clients interested in supervising their own care

# 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 forms of 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 nearly one hundred clients in 2011, and SASI caregivers have helped more than two hundred clients since SASI became a direct provider of home services in 2008.



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

**Clients by City—2012:** Chicago, Deerfield, Evanston, Glenview, Highland Park, Lincolnwood, Northbrook, Park Ridge, Skokie, Wilmette, Winnetka

## ***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.

## **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 16 hours of training a year.

Caregiver job training remains vital to our agency. Training topics in 2012 included: Communication with People with Communication Loss; MS; Activities and Dementia; Disaster Procedures; Client Dignity and Self-Determination; and Preventing and Reporting Elder Abuse.



# 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.

## The SASI Advantage

- **Higher caregiver standards**

The State of Illinois requires 8 hours of caregiver training and a one-time physical; SASI provides 16 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 home readiness, administrative assistance 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.



# Fundraising and Outreach

**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.

Dr. Martha Twaddle, Chief Medical Officer of the Midwest Palliative and Hospice CareCenter and a nationally recognized expert in hospice and palliative medicine, was honored in 2012 for her contributions and commitment to helping older adults remain at home in comfort and with dignity. State Representative Elaine Nekritz served as the 2012 event honorary chair.

**“Celebrating Experience,”** SASI's quarterly art exhibit, features the work of older adults. Our 2012 exhibits included paintings by Michael Birnbaum, Lowell Goone, Robert Leopold, Delores Rix and Joanne Salvatore; paintings and drawings by Patricia Schuler; prints and paintings by Hope Salmanoff; textiles by Mary Jo Bowers; and photographs by Peter Nussbaum and Howard Tyner.

**“Aging Well,”** a collaboration of the City of Evanston, SASI and several nonprofits and businesses associated with older adult services, is an annual conference for the public that focuses on strategies for healthy aging. SASI has helped organize the conference since its inception in 1999; in 2012, Board of Directors member Ann Searles and Program and Services Supervisor Jeanie Ramsey assisted.



SASI Executive Director Marie O'Connor and Midwest Palliative and Hospice CareCenter Chief Medical Officer Martha Twaddle, M.D.

**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.

## **Corporate, Community and Foundation Friends**

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Abbott Laboratories Fund	Horizon Realty Group	Retirement Research Foundation
Cole Taylor Bank	Louise H. Landau Foundation	Takeda Pharmaceuticals N.A.
E & C Combs, Inc.	Midwest Palliative & Hospice CareCenter	Elizabeth Beidler Tisdahl Foundation
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## In-Kind Donors

*Thanks to the many in-kind donors and volunteers who made the "Ruby Slipper" event successful, including videographer Kate Wrobel of Optimus and video participants Dr. Lori Jackson and Myrtle Jackson, and:*

Abt Electronics	Enaz	Leonidas Café Chocolaterie	Phyllis Reda, Designer
Ala Carte	Wanda Enoch	Leslie M. Stern Design	Dorothy Rosen
Alni Nails	Ergo Salon & Spa	Lettuce Entertain You	Steve Rosen
Vincent Anthony	Evanston Athletic Club	Light Opera Works	Royin Sushi Bar
Geoffrey Baer	Rosemary Fanti, Illustrator	Lighthouse Inn	Gary Segal
Sarah Bender	Food for Thought	Kathy and Jack Lipscomb	Susan Segal
Jody Birnbaum	Foodstuffs	Susan Livingston	SheBeads
Black Ensemble Theatre	Francesca's North	LuLu's	Roger Shule
Blind Faith Café	Fuenfer Jewelers	Aaron Macsai	Siam Splendor
Bliss My Sole Reflexology	Gale Gand	John Macsai	Beth Slutsky
Bluestone Restaurant	Michael Garcia	Maplewood Hotel	SPEX
Dale Bradley	Ben Gerber	Robin Marcus	Sportsline
Ellen Browne	Gino's East	McGaw YMCA	Steep Theatre
Dorothy Carlson	Glenview Park District	Peter McGuire	Stella
Catered by Design	Glenview Tennis Club	Mitchell Museum of the American Indian	Steppenwolf Theatre
Central Street Cafe´	Arnie Glickman	Music Box Theater	StrengthTime Kenilworth
Chicago a Cappella	Green Bay Animal Hospital	New Loyalty, USA	Stuart Rodgers
Chicago Botanic Garden	Hackney's	Next Theatre	Photography
Chicago Cubs	Peter Hanig	Mary Ann Niles	Studio Beads
Chicago Shakespeare Theater	Shery Hill	North Pond	Subway, Emerson Plaza
Close Knit	Hilton Garden Inn, Evanston	North Shore Country Club	Sweet P's Pantry
Creative M Photography, Inc.	Mindy Horne	North Shore Village	Taco Diablo
Curt's Cafe´	Illinois Holocaust Museum & Education Center	Notice	The Design Center for Your Home
Michele Daniels	Susan Kamp	Oceanique	Vibrato Boutique
Kina Denton	Beth Kahn	Marie O'Connor	Laura Washington
Dinner at Eight	Nancy Katz	Paper Source	Wilmette Jewelry
Del Dominguez	La Colonna	Perennials	David Wolf
Ed Debevic's	Buffy LaBahn-Walgreen	Pete Miller's	Wood Restaurant
Edward Jones	Ivy Lenore	Phil Stefani Restaurants	Writers' Theatre
Edwardo's		Peter Ray	Sue Wynne

## Volunteers

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Anna Ditton	Maddy Hickey	Aiden Lucas	Ariel Singer
Amy Falk	Evelyn Hoffmann, Atty at Law	Peter Lucas	
Kurt Fleschig		Gay Menges	

# Timeline

<b>Mid-1970s</b>	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.
<b>1975-1976</b>	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.
<b>1977-1987</b>	SASI places 1600+ older adults in general office, accounting, public relations, bookkeeping, home maintenance, home companion and other employment positions.
<b>1983</b>	<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>
<b>1995</b>	SASI focuses on placing caregivers 45 years old and older in the homes of older adults who need assistance.
<b>2000</b>	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.
<b>2009</b>	<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>
<b>2010-2011</b>	SASI expands services to include Home Readiness, Caregiver Screening and Administrative Assistance.

# FISCAL YEAR AUDIT JANUARY 1, 2012 – DECEMBER 31, 2012

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

<b>REVENUE AND PUBLIC SUPPORT</b>	
Individual contributions	\$ 52,734
Foundations, corporations and local government	19,095
Program fees	536,876
Special events	84,483
Interest income	36
Net assets released from restrictions	0
Total Revenues and Other Support	\$ 693,224
<b>EXPENSES</b>	
Program	607,316
Management and general	37,470
Fundraising	54,028
Total Expenses	<u>698,814</u>
<b>CHANGE IN NET ASSETS</b>	(5,590)
<b>NET ASSETS</b>	
Beginning of year	<u>105,954</u>
End of year	\$ <u><u>100,364</u></u>

## **Financial Statements of Seniors Action Service, Inc. DBA Services for Adults Staying in Their Homes Statement of Financial Position December 31, 2012**

<b>ASSETS</b>	
Cash and cash equivalents	\$ 121,667
Accounts receivable	36,546
Pledges receivable	250
Grants receivable	2,667
Prepaid expenses	1,266
Unemployment savings account	2,949
Rent deposits	3,406
Property and equipment	9,659
Total Assets	<u>\$ 178,410</u>
<b>LIABILITIES</b>	
Account payables	\$ 991
Accrued expenses	27,055
Notes Payable	50,000
Total Liabilities	<u>78,046</u>
<b>NET ASSETS</b>	
Unrestricted	97,697
Temporarily restricted	2,667
Total Net Assets	<u>100,364</u>
Total Liabilities and Net Assets	<u>\$ 178,410</u>
<b>Functional Expenses as percent of total expenses</b>	
Program	87%
Management & General	5%
Fundraising	8%



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