Services for Adults
Staying in Their Homes

ANNUAL REPORT
January 1, 2010  —  December 31, 2010

We make living easier.
As we reflect on last year’s accomplishments and set benchmarks for the future, we realize that an ongoing priority is distinguishing SASI from other organizations that assist adults challenged by aging, illness or injury. Can SASI stand apart from other home care providers – local for-profits, national franchises, and other nonprofit providers? Can this be done within a framework true to our nonprofit mission and values?

The answer to both questions is yes. SASI’s overriding goal as a nonprofit is to strengthen the communities we serve through needed services, rather than to profit from those services. Mission and values drive our commitment to maintaining superior service quality and affordable fees, with 30% of 2010 clients receiving discounted fees for needed care.

Last year marked the completion of a two-year capacity-building grant from Retirement Research Foundation. With this generous grant, SASI increased the ability of the organization to reach more individuals who could benefit from knowing about the agency and its services. It also strengthened its fundraising capacity as the agency strives to increase discounts to individuals in need.

Ultimately, what matters most is what you and your neighbors think about SASI. Over a quarter of the calls that we receive are personal referrals — a sign of your trust in us to assist friends and relatives at a vulnerable time in their lives. We hope you agree that SASI adds meaning to the everyday lives of adults in need of some assistance, and that as an independent, local nonprofit, we add value to the communities we serve.

Ellen Browne	 Marie O’Connor
Board President	 Executive Director

SASI supports the efforts of older adults to remain in their homes: we make living easier.

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

We make living easier.

SASI...

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

... is a steadfast, trusted resource providing an affordable and reassuring way to stay home. SASI recognizes the emotions involved — of the individuals receiving care and of their family and friends — and offers understanding and professionalism during a challenging time.

Who We Help...

... 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.

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 personal residence of individuals returning home from a stay in the hospital or rehabilitative facility;
- screening individuals an older adult may want to hire directly for help at home.

“For the first time since I became incapacitated, I feel safe because I know my caregiver is there for me.”

SASI assisted nearly 160 clients during the 2010 year.

SASI helped more than 1,300 clients in the past 5 years.

SASI serves Chicago and north/northwest Cook County communities.

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. Though the Illinois Department of Public Health requires annual training of eight hours per year, SASI requires a total of twelve hours per year from each caregiver in order to remain eligible for placement with clients.

Caregiver job training remains a vital aspect of the agency. Each caregiver attended one two-hour training every other month. Training topics included: Mental Health and Aging, Normal Aging and Chronic Conditions (such as arthritis and heart disease), The Art of Jewish Caregiving, The Best Friends Approach to Dementia Care, Parkinson’s Disease and Progressive Supranuclear Palsy, Non-Alzheimer’s Dementias, and ALS. SASI also provides job training to non-agency at-home helpers who are hired directly by people in the community.

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

Social Service Agencies .............20%
Word of Mouth .......................26%
Medical Institutions .................10%
  Rehabilitation Centers .............2%
  Hospice Centers .....................4%
  Hospitals ............................5%
City and Village Departments ...5%
Advertising ...........................4%

Operations Highlights
- Offering agency-supervised care through caregivers who are bonded and insured agency employees.
- Customer satisfaction surveys show SASI clients are very satisfied with their caregiver(s) and the agency staff and operations.

How We Do It …

- board members
  Who shape and guide the agency and its philosophy.

- caregivers
  SASI increased the number of agency-employee caregivers to meet the needs of clients who are more comfortable hiring an agency to provide service. SASI continues to screen, interview and train placement registry caregivers, with 100+ committed caregivers on the registry.

- 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** who help raise community awareness and necessary funds for SASI.

SASI’s annual benefit, **The Ruby Slipper Event: There’s No Place Like Home** is the signature event of the agency. The festive celebration reflects SASI’s philosophy of honoring older adults.

Helen Heyrman was honored at the 2010 benefit for her lifelong professional and personal commitment to older adults. The Caregiver of the Year was Alene Benjamin. Skokie Mayor George Van Dusen served as the Event Honorary Chair.

**Bill Aki** shared his thoughts about Caregiver of the Year Alene Benjamin helping his mother:

"Each night Alene comes in with a smile on her face and such an upbeat manner. Mom is immediately happy. For seniors, particularly those with dementia, turning off the light and being left alone can be very frightening. Mom still falls asleep easily, I know, because of the trust and friendship she shares with Alene. Alene, on behalf of Mom and myself, congratulations on winning this award. But more than this, we thank you."

We thank you.

... **Dedicated Donors** whose support strengthens SASI’s ability to help people age in place. Funders, in-kind donors, individuals, volunteers – all are essential to fulfilling SASI’s mission.

### Funders
- Anonymous
- Evanston Community Foundation – Root2Fruit
- New Trier Township Retirement Research Foundation

### Volunteers
- Jeanne Fox
- Cathy Grever of GoDesign
- John Hickey
- Erin Jacob
- Karen Jensen
- Beth Lange
- Aidan Lucas
- Peter Lucas
- Naja Maltezos
- Gay Menges
- Nancy Nicholson
- Brooke Ramsey
- Joe Ross

### Corporate Friends
- John J. Cahill Inc.
- CBOE
- First Bank and Trust of Evanston
- Hanig’s Footwear
- Irmco Properties & Management Corp.
- Midwest Palliative & Hospice CareCenter
- North Shore Village
- NorthShore University HealthSystem
- Northwestern University
- Siam Splendor
- Westminster Place of Presbyterian Homes
- Ayla’s Originals
- The BIG Picture Home Theater Co.
- Chalet Nursery
- Chef’s Station
- Chicago a cappella
- Chicago Blackhawks
- Chicago Line Cruises Ltd.
- Chicago Cubs
- Chicago Shakespeare Theater Close Knit
- Craniosacral BioDynamics
- Cynthia Rowley
- DanceCOLective
- Michele Daniels
- Duxler Complete Auto Care
- Ergo Salon
- Evanston Golf Club
- Evanston History Center
- The Field Museum
- Ellen Frank-Miller
- Frankie’s Scallopine
- William Gifford
- Cathy Grever of GoDesign
- Peter Hanig
- Harris Theater for Music & Dance
- Holly Heap
- Heaven Meets Earth Yoga
- Hilton Garden Inn
- Karen Hunt
- Sue Kamp
- Michael Kerns
- Las Palmas
- Kathryn Lehner
- Jeryl Levin
- Light Opera Works
- LuLu’s
- Lynfred Winery
- Charles Marshall
- Robert Marshall
- Phyllis Mitzen
- More Cupcakes
- Music Box Theatre
- Music Institute

### In-Kind Donors
- A Fair to Remember boutique
- Medication Review
- Flu Clinic
- Income Tax Planning for Seniors
- Celebrating Experience Gallery
- Healthy Aging Seminar

New people learned about SASI at other outreach events:

- A Fair to Remember boutique
- Medication Review
- Flu Clinic
- Income Tax Planning for Seniors
- Celebrating Experience Gallery
- Healthy Aging Seminar
## In-Kind Donors (continued)

- Next Theatre Company
- North Shore Retirement Hotel
- Northlight Theatre
- North Shore University Health System
- Northwestern University Athletic Dept.
- Oak Park Festival Theatre
- Joyce O’Callaghan
- Oceanique
- Kate Wrobel-Ostreichner
- Piccolo Theatre
- Pick-Staiger Concert Hall
- Pineyard
- Pinstripes
- Lucy Radtke
- Therapeutic & Wellness
- Timeline Theatre Company
- Trattoria D.O.C.
- Trio Salon
- TruFit Personal Training Studio
- Trump International Hotel & Tower Chicago
- UBAAP Tap & Old Crawford Inn
- USA Basketball
- Vogue Fabrics
- WhirlyBall
- Wilmette Theatre
- Writers’ Theatre
- Teresa Marie Yentar
- Yolk Restaurant
- Zoobooks

## Individual Donors (continued)

### $5,000 and Above

- Anonymous (2)
- Ellen & Bill Browne
- William & Carolyn Gifford
- Marie O’Connor & James Lucas
- Alvin Dodek & Linda Schwartz
- Anonymous (2)
- Susan Ringel Segal & Gary Segal
- Ann & John Searles
- Julie E. Kaufman & Elizabeth Heyrman
- Mark Heyrman & Linda Levine
- Eve & Albert Nichols
- Emily & Matt Cox
- Dorothy Rosen
- Annemaria Martin
- Charles & Alicia Marshall
- Robert & Isabel Curley
- Charles Lockwood
- Charles & Alicia Marshall
- Annamaria Martin
- Dorothy & Steven Rosen

### $2,000 - $4,999

- Marcia & Stuart Rubin
- Susan A. Kamp
- Karen Hunt
- Stan & Pam Leimer
- Marcia & Stuart Rubin
- Tim & Priscilla Stevens
- Marilyn Hennessy
- Holly Heap
- Karen Hunt
- Susan A. Kamp
- Stan & Pam Leimer
- Marcia & Stuart Rubin
- Martha Gray
- Christina Ferraro
- Diane & Cotton Fite
- Eileen Fleming
- Suzanne & Cory Franklin
- Martha Goldstein
- Eileen Griffin
- Michael Hermes
- Evelyn Hoffman
- Carol Jane Lane
- Beth Lange
- Leslie Markman Stern & Phil Stern
- Joseph Moskal
- Diane Stone
- Howard & Marilyn Usen

### $500 - $999

- Anonymous (2)
- Bob & Isabel Curley
- Deborah DeMano
- Robert Felsenthal & Roxanne Hori
- Irene Frye
- Davidi Gali
- Frederi Greenberg & Dan Pinkert
- Helen Heyrman
- Robert Lockwood
- Charles & Alicia Marshall
- Annamaria Martin
- Dorothy & Steven Rosen

### $100 - $249

- Nancy Nicholson & Joseph Zurawski
- Mary & Michael O'Donnell
- Janet & Ralph Otwell
- Katy & Bob Pendleton
- Susan Rabe
- Alvin & Winnie Farbman
- Julie E. Kaufman & Elizabeth Heyrman
- Mark Heyrman & Linda Levine
- Alvin Dodek & Linda Schwartz
- Nina Burton & Matthew Nichols
- Sands & Bruce Johnson
- Jennifer Joseph
- Ann & Bernie Jennett
- Lisa & John Iberle

### Under $100

- Anonymous (6)
- Edward & Mary K. Agnew
- William & Mariko Aki
- Jean Alexander
- Kausar Allahkhrata
- Gloria & Dennis Allen
- Paul & Marilee Allen
- Louis & Nancy Allred
- Camille Altay
- James & Ilona Alwin
- Nan Anderson
- Mary Kay & Armand Andreoni
- Tara Arnaud
- Judith Armopolin
- Randy & Linda Balla
- Florence Bank
- Margaret Barr
- Celia Berdes
- Ronald Berns
- Terri Bernsohn
- Benita Boettner
- Mary Bowers & Sarah Tshaen
- Susanne Brady
- Walter & Joan Brannigan
- Elizabeth Browder
- Jane Brumitt
- Mary Burts
- Bobby & Suzanne Calder
- Lefroy & Margaret Carlson
- Steve & Sue Carlson
- Beaulah Cheeks
- Jean Cleland
- Danielle Clemens
- Georgia Cohen
- Mary Daley
- Michele & Rodney Daniels
- Lakshmi Das

*Deceased
SASI employs caregivers and offers agency-supervised care. SASI's Board approves doing business as Services for Adults Staying in Their Homes (SASI) to better reflect the agency mission & programs.

**Timeline**

### MID-1970s
- **1975-1967**: Seniors Action Service, Inc. (SASI) was formed with partial funding from United Way. It continued helping workers 60 and older gain employment after retirement or layoffs through the job placement program. It also created, with the help of over 80 volunteers, a Discount Directory of Evanston merchants for the community's senior citizens.

### 1977-1987
- **1977**: SASI placed 1600+ senior citizens in general office, accounting, public relations, bookkeeping, home maintenance, home companion and other employment positions.
- **1979**: SASI contracts with CJE SeniorLife and other experts in aging to develop the EXCEL (Excellence in Eldercare Education and Employment) training program preparing individuals to become caregivers. Over 80 individuals completed the program before it ended in 2005.
- **1983**: SASI created the Caring Home Aid Program (CHAP) to meet the growing need of seniors requiring help to stay at home. The program included training for caregivers, employment of seniors as caregivers, and local merchants offering seniors discounts directly.
- **1989**: The Discount Directory is discontinued due to the large number of volunteer hours needed to put it together, and the growing popularity of senior discounts by individual merchants.
- **1995**: SASI focuses on placing caregivers 45 years and older with seniors needing assistance in their homes.
- **2000**: SASI offers support services to older adults interested in maintaining a desired level of independence in their personal residence.
- **2009**: SASI's Board approves doing business as Services for Adults Staying in Their Homes (SASI) to better reflect the agency mission & programs.

SASI employs caregivers and offers agency-supervised care. Receives licensure from the Illinois Dept. of Public Health after a site survey as a Home Services Agency and Home Services Placement Agency.
Statement of Activities of Seniors Action Service, Inc. DBA Services for Adults Staying in Their Homes

REVENUE AND PUBLIC SUPPORT

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual contributions</td>
<td>$23,363</td>
</tr>
<tr>
<td>Foundations, corporations and local government</td>
<td>37,189</td>
</tr>
<tr>
<td>United Way</td>
<td>0</td>
</tr>
<tr>
<td>Program fees</td>
<td>157,628</td>
</tr>
<tr>
<td>Processing caregivers</td>
<td>3,500</td>
</tr>
<tr>
<td>Special events</td>
<td>68,688</td>
</tr>
<tr>
<td>Interest income</td>
<td>103</td>
</tr>
<tr>
<td>Net assets released from restrictions</td>
<td>0</td>
</tr>
<tr>
<td>Other Program Revenue</td>
<td>0</td>
</tr>
<tr>
<td>Total Revenues and Other Support</td>
<td>$290,471</td>
</tr>
</tbody>
</table>

EXPENSES

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>$265,855</td>
</tr>
<tr>
<td>Management and general</td>
<td>30,057</td>
</tr>
<tr>
<td>Fundraising</td>
<td>60,205</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>$356,117</td>
</tr>
</tbody>
</table>

CHANGE IN NET ASSETS

<table>
<thead>
<tr>
<th>Net Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning of year</td>
</tr>
<tr>
<td>End of year</td>
</tr>
</tbody>
</table>

Financial Statements of Seniors Action Service, Inc. DBA Services for Adults Staying in Their Homes

Statement of Financial Position December 31, 2010

<table>
<thead>
<tr>
<th>Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
</tr>
<tr>
<td>Accounts receivable</td>
</tr>
<tr>
<td>Pledges receivable</td>
</tr>
<tr>
<td>Grants receivable</td>
</tr>
<tr>
<td>Prepaid expenses</td>
</tr>
<tr>
<td>Rent deposits</td>
</tr>
<tr>
<td>Property and equipment</td>
</tr>
<tr>
<td>Total Assets</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account payables</td>
</tr>
<tr>
<td>Accrued expenses</td>
</tr>
<tr>
<td>Total Liabilities</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
</tr>
<tr>
<td>Temporarily restricted</td>
</tr>
<tr>
<td>Total Net Assets</td>
</tr>
<tr>
<td>Total Liabilities and Net Assets</td>
</tr>
</tbody>
</table>

Functional Expenses as percent of total expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program</td>
<td>75%</td>
</tr>
<tr>
<td>Management &amp; General</td>
<td>8%</td>
</tr>
<tr>
<td>Fundraising</td>
<td>17%</td>
</tr>
</tbody>
</table>