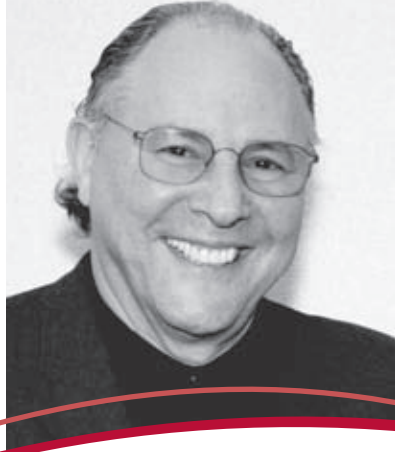


# 2009 ANNUAL REPORT



**Jewish Home Lifecare**  
**Mission:** *We are passionate about the quality of aging. The services we provide support health, individuality and dignity. Our mission is Lifecare.*

Life goes on, no matter the ups and downs of the economy. And if we at Jewish Home Lifecare have learned one thing over our 160 years, it's that the big picture – respecting, honoring, and empowering our elders – is what counts most. We are proud to say that not only was 2009 a year in which we served a record number of elders from all religious, ethnic, and social stratas, it was a year in which we completed and embarked upon some of our most exciting projects ever. And all the while, budgeting was readjusted, efficiencies were increased, and fund development was accelerated. We reexamined work relationships with our labor partners and established additional partnerships with public service groups and advocacy organizations to forward an agenda of empowered aging. Plans for implementing a capital campaign, "Building for People," to fund rebuilding projects at our campuses and to create endowed programs that will change the way we care for elders moved forward. Despite obstacles, 2009 was a year of service and meaning.

*Sincerely,*

**Stanley H. Pantowich**  
 Chairman, System Board

**Audrey S. Weiner, DSW, MPH**  
 President & CEO

**In 2009, Jewish Home Lifecare served over 14,000 individuals; 59% in the community through the Community Services Division and 23% in short-stay rehabilitation.**

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**366 students – medical, clinical, professional – received education and training at Jewish Home Lifecare in 2009.**

**In additional, we trained over 2,000 certified nursing assistants. CNAs provide direct care to residents in long-term care facilities.**

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**32% of the individuals Jewish Home Lifecare cared for were served by more than one of our programs or services, up 5% from 2008.**

*Caring as individual as you*

## THE “NEW OLD AGE” KEEPS GROWING

2009 was a year in which Jewish Home Lifecare’s commitment to caring for individuals came to life with notable achievements. We welcomed the next generation of geriatric healthcare professionals by celebrating *the graduation of the first class of our Geriatric Career Development* program for high school students in the Bronx and Manhattan – all of whom were accepted to college. Our Upper West Side community honored Jewish Home Lifecare, as we received Manhattan Media’s Westy Award for founding the same Geriatric Career Development program. We were recognized for excellence by our professional peers with the *Brownfield Award for the environmental remediation* of the Kenneth Gladstone Building, our HUD 202 housing property in the Bronx and an *Excellence in Research Award* from the American Association of Homes & Services for the Aging. Our pioneering efforts in providing *adult day health care programs achieved significant milestones*: the Sarah Neuman Center celebrated its 10th anniversary and Manhattan, its 20th. We embarked on planning for the most progressive elder care campus in Manhattan. We began a partnership with **THE GREEN HOUSE® Project** to explore the feasibility of bringing the first truly urban elder care homes to New York City built in accordance with the Green House model. Green House initiatives are supported by the Robert Wood Johnson Foundation, the nation’s largest philanthropy devoted exclusively to improving health and healthcare.

We are proud to work with these national organizations and together with our trustees, staff, clients, their families and caregivers, Jewish Home Lifecare will continue to define how elder New Yorkers will live their lives to the fullest.



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We began a partnership with **THE GREEN HOUSE® Project** to make home and choice a reality.

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**Sarah Neuman Center** was the first nursing home in New York to host a medical student from the University of New England’s “Living by Learning” Program. The student became a “resident” of the nursing home to look beyond age and disease to see the way residents live.

# A 360 DEGREE WEB OF CARING AND CONNECTING

**Rehabilitation and Recovery:** The focus of short-stay rehabilitation is to get patients on their feet and back home as soon as possible. The number of admissions to our rehabilitation programs continues to increase. In 2009, 23% of Jewish Home's total care population was served in short term rehabilitation, up 20% from 2007. Whether in our Sarah Neuman Center in Westchester, our Bronx Campus, or Manhattan location, Jewish Home Lifecare rehabilitation yields real results. 86% of our rehabilitation patients return to their homes after treatment.

**Homecare:** Our Homecare programs are designed to keep clients independent, active and, most importantly, at home with ongoing monitoring of health, comfort and quality of life. In the Bronx and Manhattan, Jewish Home cared for 1,467 individuals in their homes. Additional clients served through geriatric care management, telehealth and Jewish Home personal care aides increases the number of those served in the community to 2,664.

**Skilled Nursing:** Skilled nursing for residential long-term care is available at each of Jewish Home's nursing homes and offers communities of caring with 24-hour skilled nursing in a safe, residential setting. In 2009, over 1,900 elders lived in Jewish Home communities of caring. Overall occupancy in the nursing homes continues to be high; Jewish Home average is 98% while the New York State average is 94%.

**Senior Residences:** Jewish Home sponsors two HUD 202 affordable residences in the Bronx, providing homes for 123 tenants. Kittay House offered apartments to 330 independent seniors. A third HUD 202 building, the Harry and Jeanette Weinberg Gardens, will open in 2010.

**Adult Day Programs:** Our Adult Day programs offer health monitoring, rehabilitation and opportunities for socialization for seniors who might not be able to leave their homes on a regular basis. Over 960 clients participated in Adult Day programs in 2009. Their average age is 72 with the youngest clients in the Bronx and the oldest at Sarah Neuman Center. Jewish Home provides transportation for clients, as well as meals and cultural, educational and lifestyle activities.

**The Research Institute for Aging** maintains affiliations with leading medical schools and research facilities, including Mt. Sinai School of Medicine, in order to conduct pioneering research and provide educational opportunities to students. Research studies for 2009 focused on memory enhancement intervention, palliative care programs, dementia, Alzheimer's and Parkinson's diseases, and depression among elders. Foundation and government support were received from The National Institute on Aging, The Fan Fox and Leslie R. Samuels Foundation, American Medical Directors Association and the National Institute on Mental Health among others. Over 2,000 students, clinical and professional, studied at Jewish Home in 2009. Twenty-three papers were published by research staff, along with 22 presentations at conferences and 15 research studies were conducted during the year.



# A WAVE OF DEVELOPMENTS IN DEVELOPMENT

Each year, the generosity of our donors enables Jewish Home Lifecare to continue its long-standing commitment to caring. Here are some examples:

## STAY-AT-HOME GALA

The Fifth Annual Stay-at-Home Gala raised more than \$300,000 in support of year-round programs such as yoga and Tai Chi, arts and crafts classes, musical entertainment, resident outings and holiday parties that enhance the quality of life for the elders we serve.

## FOUNDATION AND GOVERNMENT SUPPORT

We are grateful to the following foundation and government agencies for their continued support of programs ranging from geriatric career development to senior housing, research and education, adult day care and wellness programs, to name a few.

- Altman Foundation
- Alzheimer's Association
- Mandell L. and Madeline H. Berman Family Foundation
- J.E. and Z.B. Butler Foundation
- Herman Goldman Foundation
- Stella and Charles Guttman Foundation
- Carl Marks Foundation
- Henry and Lucy Moses Fund
- Henry Nias Foundation
- National Institute on Aging
- National Institute on Mental Health
- New York City Department for the Aging Office of Intergenerational Services
- New York City Department of Housing Preservation as designated by the Office of the Bronx Borough President, Ruben Diaz, Jr.

- New York City Department of Health and Mental Hygiene as designated by New York City Council Member, Melissa Mark Viverito
- New York City Department for the Aging as designated by New York City Council Member, Maria Baez
- New York State Department of Education 21st Century Learning Center Program
- New York City Department of Design and Construction as designated by the Office of Manhattan Borough President, Scott Stringer
- Reader's Digest Scholarship Fund of the New York Community Trust
- The Fan Fox and Leslie R. Samuels Foundation
- The Spanier Family
- The Tides Youth Development Institute
- UJA-Federation of New York
- The Judy and Fred Wilpon Family Foundation

## FUNDRAISING AND OTHER EVENTS

- The Friends of Sarah Neuman raised \$60,000 through their biannual Gourmet Spring Tasting event.
- The Jim and Trudy Woolner Fund was established to create a Media Center for residents at the Sarah Neuman Center in Westchester. The Woolner friends and family raised \$30,000 and a formal dedication ceremony took place in summer 2009.

- The sixth annual Tea & Symphony concert for Manhattan residents raised \$10,000 for Manhattan resident recreation programs.
- The Annual Palliative Care Conference was made possible through the support of **The Allan Morrow Foundation**. Geriatric care experts discussed key issues and multidisciplinary strategies for helping patients with advanced illnesses.

## PLANNED GIVING – THE HERITAGE SOCIETY

The Heritage Society recognizes those who have provided for Jewish Home Lifecare with a planned gift. Their bequest, charitable gift annuity or other planned gift commitment demonstrates a respect for the past and a responsibility for the future.

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**In 2009, Jewish Home Lifecare raised \$8 million toward Capital and Annual Campaign initiatives.**



# 2009 FINANCIALS

## CONSOLIDATED BALANCE SHEET

The following summary of financial information was audited by Loeb & Troper LLP for Jewish Home Lifecare. The complete, audited financial statements, including related notes and Loeb & Troper's opinion as independent auditors, may be obtained by writing to Jewish Home Lifecare, 120 West 106th Street, New York, NY 10025 or to the New York State Department of Law, Charities Bureau, 120 Broadway (Third Floor), New York, NY 10271-0332.

ASSETS	2009	2008	ASSETS	2009	2008
<b>CURRENT ASSETS</b>			<b>LIABILITIES AND NET ASSETS</b>		
Cash and cash equivalents	\$9,728,199	\$14,630,593	Accounts payable and accrued expenses	\$32,792,142	\$28,049,696
Cash – resident funds	2,131,248	1,802,651	Accrued salaries and related liabilities	7,546,284	5,711,163
Investments	50,017,276	39,881,236	Line of credit	9,499,497	9,499,497
Investments – resident funds	908,301	880,436	Resident funds	3,039,549	2,683,087
Accounts receivable – net	38,578,192	35,490,344	Accrued pension payable	4,204,551	5,573,917
Inventories – at cost	705,496	805,316	Accrued interest payable	24,573	28,696
Contributions receivable - net	9,984,172	7,818,536	Annuity obligations	130,220	212,121
Prepaid expenses and other receivables	1,680,490	1,016,735	Estimated liabilities to third parties	10,329,065	7,869,706
<b>Total current assets</b>	<b>\$113,733,374</b>	<b>\$102,325,847</b>	Security deposits and other liabilities	1,245,919	793,779
<b>LIMITED-USE ASSETS</b>			Current portion of long-term debt	3,409,938	3,157,179
Cash and cash equivalents	\$19,465,445	\$19,014,842	<b>Total current liabilities</b>	<b>\$72,221,738</b>	<b>\$63,578,841</b>
Investments	709,802	1,622,469	<b>LONG-TERM LIABILITIES</b>		
Accrued interest receivable		5,359	Accrued pension payable	\$29,255,752	\$18,037,904
<b>Total limited use assets</b>	<b>\$20,175,247</b>	<b>\$20,642,670</b>	Mortgages payable	35,690,109	39,054,809
<b>OTHER ASSETS</b>			Loans payable	4,601,774	4,859,796
Cash and cash equivalents	\$80,025	\$80,000	Capital advance	23,442,549	14,294,891
Investments	12,670,549	12,935,003	Total long-term liabilities	\$92,990,184	\$76,247,400
Beneficial interest in gift annuities	505,483	491,805	<b>Total liabilities</b>	<b>\$165,211,922</b>	<b>\$139,826,241</b>
Contributions receivable – net	2,345,069	2,602,715	<b>NET ASSETS</b>		
Fixed assets – net	134,514,061	122,861,871	Unrestricted	\$59,732,980	\$71,082,485
<b>Total other assets</b>	<b>\$150,115,187</b>	<b>\$138,971,394</b>	Temporarily restricted	49,761,840	41,888,320
<b>TOTAL ASSETS</b>			Permanently restricted	9,317,066	9,142,865
	<b>\$284,023,808</b>	<b>\$261,939,911</b>	<b>Total net assets</b>	<b>\$118,811,886</b>	<b>\$122,113,670</b>
			<b>TOTAL LIABILITIES AND NET ASSETS</b>		
				<b>\$284,023,808</b>	<b>\$261,939,911</b>

In 2009, nearly 3,000 calls were answered by our Connections Information and Referral Service, the gateway to all the programs, services and eldercare resources available at Jewish Home Lifecare.

## CONSOLIDATED STATEMENT OF ACTIVITIES

	UNRESTRICTED	TEMPORARILY RESTRICTED	PERMANENTLY RESTRICTED	TOTAL 2009	TOTAL 2008
<b>OPERATING REVENUES</b>					
Inpatient	\$202,284,844			\$202,284,844	\$206,996,718
Outpatient	60,428,186			60,428,186	58,196,637
Apartment rentals	4,900,542			4,900,542	4,951,152
Other operating revenues	5,523,932			5,523,932	6,571,162
Contributions	914,525			914,525	337,932
Net assets released from restrictions	1,952,378	\$(1,952,378)			
Total operating revenues	\$276,004,407	\$(1,952,378)		\$274,052,029	\$277,053,601
<b>OPERATING EXPENSES</b>					
Residents	\$183,654,375			\$183,654,375	\$185,428,510
Community-based	55,569,498			55,569,498	50,695,903
Housing	5,632,606			5,632,606	4,970,581
Other programs	5,763,728			5,763,728	5,557,203
Research and education	1,843,828			1,843,828	2,235,119
Administrative and general	22,121,299			22,121,299	24,542,526
Total operating expenses	\$274,585,334			\$274,585,334	\$273,429,842
<b>OPERATING GAIN (LOSS)</b>	<b>\$1,419,073</b>	<b>\$(1,952,378)</b>		<b>\$(533,305)</b>	<b>\$3,623,759</b>
<b>NONOPERATING ACTIVITIES</b>					
Contributions		\$7,051,889	\$106,401	\$7,158,290	\$10,914,383
Fund-raising activities	\$(2,396,516)			(2,396,516)	(1,845,974)
Investment income (loss) - net of investment fees	2,156,412	3,340,755		5,497,167	(14,571,670)
Net assets released from restrictions	684,660	(684,660)			
Nonoperating gain (loss)	\$444,556	\$9,707,984	\$106,401	\$10,258,941	\$(5,503,261)
Change in net assets before other changes in net assets	\$1,863,629	\$7,755,606	\$106,401	\$9,725,636	\$(1,879,502)
Reclassifications	(185,714)	117,914	67,800		
Repayment of loan by Senior Health Partners, Inc.					1,964,905
Adjustment to pension liability	(13,027,420)			(13,027,420)	(20,044,093)
Change in net assets	(11,349,505)	7,873,520	174,201	(3,301,784)	(19,958,690)
Net assets – beginning of year	\$71,082,485	\$41,888,320	\$9,142,865	\$122,113,670	\$142,072,360
<b>NET ASSETS – END OF YEAR</b>	<b>\$59,732,980</b>	<b>\$49,761,840</b>	<b>\$9,317,066</b>	<b>\$118,811,886</b>	<b>\$122,113,670</b>

# 2009 SYSTEM AND DIVISION BOARD MEMBERS

**Stanley H. Pantowich** *Chairman, System Board*

**Gene D. Resnick, MD** *Immediate Past Chair, System Board*

**Lynn Oberlander** *Chair, Bronx Board*

**Susan Glickman** *Chair, Community Services Board*

**David Haas** *Chair, Manhattan Board*

**Paul Polivy** *Chair, Westchester Board, Sarah Neuman Center*

**Audrey S. Weiner, DSW, MPH** *President & CEO*

Rosa V. Alonso • Mel Barkan • Ann Berman

William Blumstein • Thomas L. Brodie • Gary Butts, MD

James M. Dubin • John P. Engel • Bruce J. Evans • Lisa Feiner

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Goldschmidt • Samantha M. Gordon • Elizabeth Grayer

Edward A. Greenberg • Randolph Guggenheimer

Jill N. Haskel • Andrew D. Heineman • Joy A. Henshel

Joel Hirschtritt • Jonathan Hochberg • Patricia Jacobs

Richard A. Jacobs • Michael Jaffe • William Klingenstein

Jeremy Kroll • Arthur Levin, MD • Fred M. Lowenfels

Michael Luskin • Russell Makowsky • D. Edward Martin

Alan Morse, JD, PhD • Jill Oberlander • David Orelowitz

David B. Pinter • Henry Pollak, II • Pauline Raiff

Edward A. Reiss • David Robinov • Jeffrey Rothschild

Richard Rovit, MD • Tami J. Schneider

Jayne Silberman, PhD • Frank Spitalny • Linda Spitzer

David Strumwasser • Michael Tannenbaum

Joan Wachtler, LCSW • Olumide S. Wilkey

## LIFE TRUSTEES

Robert S. Gordon • Andrew D. Heineman

Walter Hess Jr. • David A. Jones • Joann Lang

Amy Pollinger • Seth Rosner • Norma Saul

Peter Strauss • Mitchell W. Waife

## SENIOR STAFF

**Patricia Beilman** *Vice President, Public Affairs*

**Bridget Gallagher** *Senior Vice President, Community Services*

**Gerald Garofalo** *Vice President, Safety & Security*

**Thomas J. Gilmartin** *Chief Administrative Officer*

**Rita Morgan** *Administrator, Sarah Neuman Center*

**Bruce Nathanson** *Senior Vice President, Marketing*

**Richard Neufeld, MD** *Vice President, Medical Affairs*

**Judith Nicholson** *Administrator, Manhattan*

**Kenneth Sherman** *Senior Vice President & Administrator, Bronx*

**Audrey R. Wathen** *Senior Vice President, Human Resources*

### JEWISH HOME LIFECARE, BRONX

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### KITTAY HOUSE, JEWISH HOME LIFECARE, INDEPENDENT SENIOR LIVING

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### JEWISH HOME LIFECARE, MANHATTAN

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### JEWISH HOME LIFECARE, COMMUNITY SERVICES

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800.544.0304

[www.jewishhome.org](http://www.jewishhome.org)

 Jewish Home Lifecare  
*Caring as individual as you*