

# LIFE

LIVING INDEPENDENTLY FOR ELDERLY

2  
0  
0  
7

## ANNUAL REPORT



## FINDING MY INDEPENDENCE

## LIFE/Penn Nursing Annual Report 2007

Modeled after the national PACE program, Living Independently for Elders (LIFE) is dedicated to advancing a unique interdisciplinary service delivery system of all-inclusive health care for frail seniors in West and Southwest Philadelphia. These seniors, faced with probable nursing home placement, are offered the choice through LIFE to instead remain in their community and receive their care in the sanctity and comfort of their own home. As the only PACE practice to be owned and operated by a school of nursing, LIFE supports these choices by delivering care that is member-centered, compassionate, and quality-driven.



### CONTENTS

1. Executive Director's Introduction
2. Member Success
3. Excellence in Healthcare Practice
4. Excellence in Education and Research
5. A Part of & Partner to the Community
6. Balance Sheet
7. The Year Ahead
8. LIFE Council of Elders
9. LIFE Governance and Senior Leadership



Dear Friends,

Our story began nine years ago, when a group of farsighted faculty from Penn Nursing inspired their school and the University to support the development of an innovative program providing all-inclusive care to frail, elderly residents of West Philadelphia; this under a nurse-managed service delivery model. From the very beginning, the founders of LIFE recognized the power of *mission to serve through an interdisciplinary team practice*. They also understood the lengths that seniors and their families would go to partner with LIFE to remain independent in their homes and community.



LIFE opened its doors at 4101 Woodland Avenue in 1998 with a tripartite mission of excellence in practice, research and education. The program commenced taking root in the community and establishing a level of trust with seniors and their loved ones. Over time the membership grew until the Woodland Avenue site could accommodate no more.

June, 2003 marked the opening of our second site at 3823 Market Street. The program continued to flourish and further integrate with the School and University. LIFE became a name that was associated with improving public health and engaging with the community. Faster than anyone anticipated we were growing out of our space at Market Street. The LIFE program, School of Nursing, members, and all of our stakeholders were faced with the decision of how best to meet the expanding need for center-based services while achieving ever higher standards of member care and socialization.

I am pleased to report that today we are occupying the solution.

In April of this year we consolidated and expanded to our new home at 4508 Chestnut Street. All 325 members of LIFE now receive their care and socialization at this one center. We believe that our new home will fully accommodate future needs of the entire West Philadelphia senior population. While physical space was paramount in the relocation, the move also provided us with the opportunity to better design our space on behalf of our members' stated needs and wishes. A tour of the building reveals clean, ample spaces with natural light infusing every program location. Member choice of programming and services is also evident.

The 4508 Chestnut Street building had previously housed a nursing home. That LIFE successfully supplanted this institution with a community-based alternative to a nursing home is ironic, and perhaps represents a foretelling of industry reform that the School of Nursing is excited to be a part of leading.

Nine years ago, our founders at Penn Nursing charged us with the mission of reaching the senior community of West Philadelphia and uplifting their level of health and independence. We embrace this mission, our past year, and the year ahead by next introducing you to one of our members, Ms. Doris A. Crosby-Lloyd and her new-found independence at LIFE.

With appreciation for your support,

Wayne D. Pendleton  
CEO

## FINDING *MY* INDEPENDENCE

10/2004: Ms. Lloyd interviewed for the Program. Chief complaint unable to ambulate, wheelchair bound.

*Doris Lloyd - Wife*

12/14/2004: Doris A. Crosby-Lloyd Joined LIFE

*Doris Lloyd - Mother*

12/14/2004 Care Plan: Member at risk for falls, Edema (legs), COPD, Asthma, Abdominal Pain

*Doris Lloyd – Grandmother*

09/22/2005 Primary Care Instructions: Oxycodone as needed, every six hours, for break through knee pain

*Doris Lloyd – Worker & Social Activist*

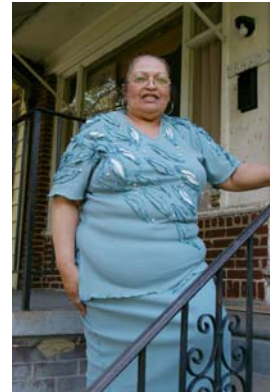
11/28/2006 Acute Care Plan: Member admitted to UPHS for right knee replacement followed by in-center rehab and exercise

*Doris Lloyd – Dancer*

08/28/2008: Since her knee surgery and rehab, no longer uses a wheelchair or walker. She occasionally uses a cane for balance & has had a dramatic increase in her independence and quality of life.

*Doris Lloyd – Believer*

*“My goal is to throw away the cane and begin to teach dance.”*



## *LIFE- Excellence in Nursing and Healthcare Practice*

In 2007 LIFE continued its commitment to setting the highest standards of nursing and interdisciplinary-based care based on best available science.

- ☑ This year will mark the most strategically significant event in the history of the practice- LIFE's successful consolidation and move to our new home at 4508 Chestnut Street. The LIFE staff and our members and their families are to be commended for their incredible vision, planning, teamwork, flexibility, and resilience as we went *above and beyond* to well exceed expectations for such a momentous change in location and facilities. LIFE's consolidation represents yet another example of the practice's deepening integration with the School of Nursing and the University. That we are now even better equipped to provide quality-based care and socialization to our membership is truly the result of a broad-based team effort.



- ☑ In 2007 the practice finalized development of a quality management scorecard and began to measure our performance against industry-based benchmarks on key strategic and quality indicators. On clinical indicators we achieved better than expected results in 100% of measures. On the strategic side of the scorecard, the practice achieved better than expected results in 50% of measures. Under the guidance of LIFE's Quality Management Committee, staff are in the process of refining measures and raising targets as we strive to continually improve our performance on behalf of our frail, elderly members.
- ☑ Leading the way as the only PACE program to be owned and operated by a school of nursing, this year LIFE transformed its nursing department into a completely member-centered care delivery structure. This represents an approach that focuses on the assessment and intervention skills of the professional nurse in relation to an identified and ongoing group of members. Moving from a task-oriented model in which nurses were primarily assigned to specific procedures and treatments, the primary nurses at LIFE now collaborate with nurse practitioners and physicians to deliver comprehensive, individualized care to their personal caseload of members. Along with the resulting quality and continuity of care benefits, this member-centered care delivery structure has offered

our professional nurses a more inclusive role within the interdisciplinary team configuration, often permitting them to assume a lead role in coordination of care provided.

- ☑ As one of the design showcases of our consolidation, 2007 also marks the winning execution of the "Main Street" concept in activities programming at LIFE. With the move to the new building, staff dedicated an entire wing of one floor to symbolize an urban main street locale complete with a salon, library and reading room, chapel, pool hall, sewing room, and fitness center. Along with these neighborhood offerings, the LIFE Main Street has fully-equipped spaces for arts & crafts, art therapy, cards and token-fed slot machines, and choir practice. Main Street spaces were designed to be flexible and individualized based on member preferences, and members enjoy strolling down Main Street at LIFE each day and choosing their late morning and afternoon activities. The Main Street concept has improved socialization and increased member satisfaction with coming to our center.

- ☑ In 2007 we finalized extensive customizations and software testing of the long-awaited InfoSys electronic health record. This summer the staff also completed super user training in anticipation of activating the software midway through the fall season.



The software is expected to help improve and streamline all phases of the operation including clinical and admissions record-

keeping, nursing-based care planning, reporting as well as finance and quality management. The coming year will mark LIFE's successful transition into the age of the e-record.

- ☑ Despite continued strong referrals, in 2007 LIFE did not experience sizeable growth as in previous years. Changes in Medicaid eligibility guidelines and more stringent application of financial redeterminations by the County contributed to an unfortunate temporary increase in member disenrollments. By the end of the year, LIFE had adjusted its marketing and social work efforts resulting in growth patterns reminiscent of previous years. This year the marketing department completely upgraded our promotional brochures and continued to assist with keeping

## The Philadelphia Inquirer

SUNDAY, MAY 27, 2007 Local WWW.PHILLY.COM



BY JARVIS GUSTAFSON/PHOTOGRAPHY BY JARVIS GUSTAFSON  
Instructor David Earley dances freely with LIFE program participants Doris A. Lloyd, left, 64, and Ruth Slocum, 75, at the LIFE Penn Nursing program in West Philadelphia. That site has one of three LIFE programs now operating in Philadelphia, and two more are in the planning stages.

### Nursing care takes a smart detour

our website current and relevant, [www.LIFEupenn.org](http://www.LIFEupenn.org). Overall marketing, community outreach, and program promotion in 2007 were at an all time high in the history of the practice, culminating in LIFE and the School of Nursing being featured on the front page of the Sunday edition of the Philadelphia Inquirer (*Nursing care takes a smart detour*, Sunday, May 27, 2007).

## LIFE at 4508-First Impressions

Henrietta Richardson-

"I like cooking in the new center. We made homemade ice cream...I really like Main Street. You can pick the activity that you want to go to."

Bertha Frazier-

"...The new center is bigger, brighter and there are more wonderful people to come into contact with. I also like the exercise class, because I have a condition where if I don't exercise, I lose my ability to walk."

George Bridget-

"I like playing pool, the food is wonderful. I have no complaints."

Grace Young-

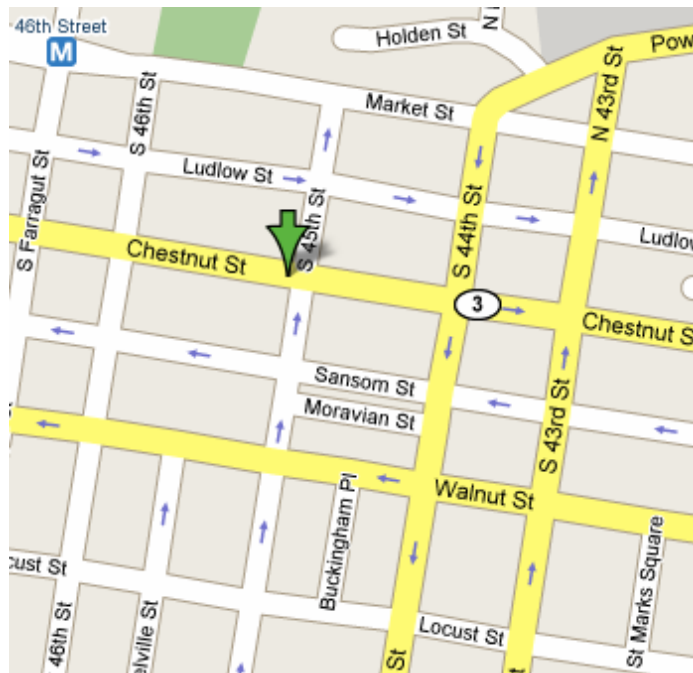
"I love the different activities and the music that is played at the center. They keep me busy while I'm here. It's a nice place to go."

Oscar Boyd-

"I enjoy the staff members and all of the people here. I love playing bingo the best."

Ruth Gilliam-

"This program gives me something positive to do. I used to go to the Market Street Center and now it's nice to mingle with the members who were at the Woodland Center. We're all together now."



## ***LIFE- Excellence in Education and Research***

During 2007 LIFE continued its promise to fulfill a tri-partite mission integrating practice with education and research initiatives. The goal of this integration is to educate eager minds about the benefits of delivering community-based care to frail elders while translating knowledge through applicable research initiatives.

- ☑ This year LIFE welcomed 223 students and provided well over 1,500 hours of educational experiences. All students were oriented to LIFE as a practice of Penn Nursing and a PACE Model of Care. Of these, 178 were students from academic programs within the University of Pennsylvania with 70 coming from the School of Nursing and the remainder from eight other institutions of higher learning. In 2007 LIFE continued its nationally leading role as a PACE program supporting student education experiences. Additionally, LIFE oriented 22 new staff members, provided 50 on-site educational programs, and ensured compliance with annual training requirements for 95 staff. We also continued to improve the quality of learning by generating a 90% student satisfaction rating across all experiences. Comments included-



“The LIFE center was a great place to start a clinical experience”  
- Penn School of Nursing Sophomore Student

“Thank you for a transformational year...very useful and recommended field placement”  
- Penn School of Social Policy & Practice Graduate Student

“Very wonderful experience- especially the integrated care of the elderly while maintaining them safe in the community. Thank you for this opportunity”  
- Einstein Medical Center Physician Resident

- ☑ Research studies based at LIFE in 2007 included:

*Effect of a Structured Exercise Program on Elderly African-American Women*

*Upper Extremity Function- Post Stroke*

*Health Related Quality of Life*

*Impact of Sleepiness on Heart Failure Self Care*

*Short Term Exercise on Body Weight in Overweight Elderly African American Women*

☑ LIFE and Penn- *A Focus on Research*

Dr. Eileen Sullivan-Marx of the University of Pennsylvania School of Nursing is currently principal investigator for a study with colleagues Drs. Mangione, Craik, and Volpe to conduct a pilot exercise study funded by the University of Pennsylvania intramural funds from the Commonwealth of Pennsylvania Department of Health, Tobacco Settlement Health Research Formula Funds. The purpose of this pilot study, using a one group pre/post test design, is to determine the relative effects on physical and cognitive function, well-being, and satisfaction with the program of a 16-week, three times per week strength and endurance exercise program for nursing home eligible African American women enrolled in LIFE, a Program for All-inclusive Care of the Elderly (PACE).



Preliminary quantitative results are being analyzed and appear promising. Comments from the LIFE Council of Elders are that the exercise has been reported to be satisfactory and beneficial to the overall program and membership. Member participants report increases in motivation, feelings of belongingness to a group, and fondness for the exercise group leaders. Voluntary participation in the exercise study continues to grow and the study has actually helped focus and meaningfully expand exercise and wellness programming across the entire program.

☑ LIFE and Penn- *A Focus on Staff*

LIFE's greatest resource is truly the staff that tirelessly, competently, and compassionately provides care to our frail, elderly members each and every day. This year we recognize **Betsy Dalton**, winner of the National PACE Association 2007 Chris van Reenan Scholarship- Recognizing *Dedication, Leadership and Inspiration*.

As a Certified Registered Nurse Practitioner, Betsy was first introduced to LIFE in 1999 as a nursing student, and has since served the program as an integral member of the interdisciplinary team. Betsy delivers primary care to our members in the Circle of Care, an area dedicated to serving those with severe dementia and improving their quality of life. In all that she does, Betsy demonstrates the utmost levels of competence, compassion, sensitivity, respect, and patience with these vulnerable



individuals and their families. It is through her unfailing devotion and upbeat manner that Betsy leads her team of committed professionals in the Circle of Care- a team that in 2007 received a Service Excellence Award from LIFE and the School of Nursing. Along with her focused work in the Circle of Care, Betsy has lead several notable program initiatives at LIFE including LIFE @ Home and our Nursing Home Transition Taskforce.

Betsy Dalton truly embodies the mission of LIFE in her day-to-day work while exemplifying the ideal qualities of staff in the PACE model of care. For this she receives special recognition in this remarkable year at LIFE!

### *A Message from President Amy Gutmann*

Dear Faculty and Staff Colleagues,



As we begin a new academic year, this is a good time both to highlight several of our achievements over the past several months and to preview some of our opportunities and challenges moving forward.

**We have made major progress under the Penn Compact over the past 8 months. ....**

**..Penn's pioneering LIFE (Living Independently for Elders) Center is now in a new, consolidated space** at 4508 Chestnut that will enable it to provide the finest in integrated health and social services to even more of our neighbors."

## *LIFE-A Part of & Partner to the Community*

### LIFE/Penn Nursing Contributing to our Community- BEYOND CARE

**As an Equal Opportunity Employer,** LIFE/Penn Nursing demonstrates strong support for diversity in the workforce.



**As a West Philadelphia-based business,** LIFE/Penn Nursing employs a significant number of Philadelphia residents; in particular those residing in our service/catchment area.

Total Payroll	Total Employees	Female Employees	Male Employees	Minority Employees	Phila Residents	LIFE Zips
\$6.8 mil	113 FTEs	82 (76%)	27 (24%)	80 (71%)	76 (67%)	41 (54%)



**As an economic partner,** LIFE/Penn Nursing contracts with a significant number of local vendors and demonstrates strong support for minority-owned businesses.

Total Phila Area Vendors	Approved Minority Vendors	Total Vendor Amount	Minority Vendor Amount
20	7 (35%)	\$3.8 mil	\$1.1 mil (29%)

## *LIFE- Balance Sheet*

### *Period Ending March 31<sup>st</sup> 2007*

<b>Assets</b>	
<b>Current Assets</b>	
Cash	600
Due to from University	2,826,937
Accounts receivable, net of allowance for doubtful accounts \$335,651	231,640
Prepaid expenses	62,423
<b>Total current assets</b>	<b>3,121,000</b>
<b>Property &amp; Equipment</b>	
Vehicles	417,692
Furniture & equipment	118,985
Software	637,363
	1,174,040
Less accumulated depreciation	264,794
<b>Net property &amp; equipment</b>	<b>909,246</b>
<b>Total Assets</b>	<b>\$4,030,246</b>

<b>Liabilities &amp; Divisional Unrestricted Net Assets</b>	
<b>Current Liabilities</b>	
Current portion of long term debt	300,000
Accounts payable	2,192,442
Payroll related liabilities	265,420
<b>Total current liabilities</b>	<b>2,757,862</b>
Long Term Debt	480,109
<b>Total liabilities</b>	<b>3,237,971</b>
Divisional Unrestricted Net Assets	792,875
<b>Total liabilities &amp; divisional unrestricted net assets</b>	<b>\$4,030,846</b>

## *LIFE- The Year Ahead*

As a program that opened its doors in 1998, the year ahead will represent a major milestone for LIFE and the School of Nursing. Our 10<sup>th</sup> Year Anniversary in 2008 will underscore a promise kept to our West/SW community of frail elders and their families. It will mark us as the first LIFE program in Pennsylvania to have been in existence for a decade, and will draw attention to the fact that we remain the largest PACE program in the Commonwealth. The year ahead will see LIFE settling in to our new and expanded facility, improving care delivery, coalescing as a nurse-managed interdisciplinary team, benefiting from newfound information technology, and further integrating with the School of Nursing and University. For 10 years LIFE has been growing, but the year ahead will have us on a path to maturation as a health plan and service provider. In 2007, LIFE arrived as a serious home and community-based alternative to nursing home placement. The year ahead will have us beginning to make good on a set of ever more eminent promises to our community.



## *LIFE- Council of Elders*



Ms Caroline Green  
Ms Delores Quinton  
Ms Doris Frank



Ms Emma Harvey  
Mr. George Parks  
Ms Helen Brown



Ms Mary Thomas  
Mr. Robert Hale  
Ms Ruth Rodriguez  
Ms Vivian Lites

## ***LIFE- Governance and Senior Leadership***

### **The LIFE Executive Committee**

Michael Wert (Chair), Board Chair of St. Mary Medical Center  
Afaf Meleis, Dean, University of Pennsylvania School of Nursing  
Eileen Sullivan-Marx, Associate Dean, University of Pennsylvania School of Nursing  
Pat Burke, Vice Dean, University of Pennsylvania School of Nursing  
Anthony Buividas, Managed Health Care Consultant  
Jane Barnsteiner, Professor, Family & Community Health of Penn Nursing  
Christine Bradway, Assistant Professor of Gerontological Nursing at Penn Nursing  
Betty Adler, Senior Counsel, Corporate Patient Services, University of Pennsylvania  
Kathleen Barron, Executive Director, Temple University Hospital, Episcopal Campus  
Johan Hoegstedt, Vice President of Global Marketing, AstraZeneca  
Wayne Pendleton, CEO, LIFE/Penn Nursing

### **The LIFE Senior Leadership Team**

Afaf Meleis, Dean, University of Pennsylvania School of Nursing  
Eileen Sullivan-Marx, Associate Dean, University of Pennsylvania School of Nursing  
Pat Burke, Vice Dean, University of Pennsylvania School of Nursing  
Trudi Sippola, Director of HR, University of Pennsylvania School of Nursing  
Patricia Adams, HR Manager, University of Pennsylvania School of Nursing  
Wayne Pendleton, CEO, LIFE/Penn Nursing

### **The LIFE Senior Management Team**

Wayne Pendleton, CEO  
Mary Austin, Nursing Practice Director/Acting Clinical Director  
Bruce Kinosian, Medical Director  
Terry Klein, Director of Finance  
Wanda Cooper, Center Director  
Luciana Hyatt, Director of Marketing  
Patricia Adams, HR Manager  
Lisa Santilli, Health Information Supervisor/HIPAA Privacy Officer  
Vincent Romano, Senior Project Manager, Information Technology  
Cherry Sturdivant, Office/Facility Manager

