This report is intended to serve as a “snapshot” of Friedman Place and provide information about our residents, staff, and finances. Most of the data is for the calendar year 2015, although some of the resident demographics are from December 2015 and the financial data is for our fiscal year, which ended June 30, 2015.

Located on the northwest side of Chicago, Friedman Place is a nonprofit residential community that serves adults aged 22 and up who are blind or visually impaired. The agency’s beginnings go back to 1935; the year 2015 was our eightieth of serving low income adults who are blind or visually impaired. The agency’s services are provided in a building that we purchased and renovated in 2004. Each resident lives in his or her own apartment - there are 81 in the building – each with a full bathroom and kitchenette. The building is specially designed for people with visual impairments such as special lighting; changes in floor textures; high-contrast paint colors; handrails; and "talking" elevators so residents may move about safely and freely while at home.

Staff, specially trained to work with adults with visual impairments, provides social work and nursing services; housekeeping; meals; and a variety of programs and activities fitting resident needs and interests. The organization is led by a volunteer board of directors.
Friedman Place provides Affordable Assisted Living to adults who are blind or visually impaired. Affordable housing and a wide range of services are provided by nurses, certified nursing assistants, social workers, activity staff, dietary staff, and others. Most residents live at Friedman Place not because they are blind, but because on average each one has 5 chronic health conditions and they require additional support and assistance. It is their health conditions that result in the need for services, it is their blindness or visual impairments that cause them to select Friedman Place.
Friedman Place has grown in recent years and now has 65 employees, who are diverse in terms of ethnicity, age, and gender. Thirty-five percent of employees have worked for the agency continuously for at least 5 years and 12% for more than 10 years. The vast majority of Friedman Place employees are extremely engaged and a recent survey indicated levels of satisfaction more than double than those found nationally in every area considered. When employees did not give one of the best responses to the individual questions they almost always gave a neutral response (e.g., “neither satisfied nor dissatisfied”). Of all the individual answers given, 73% were positive, 20% were neutral and only 7% were negative (and regarding negative answers, only one percent of the total questions answered were answered “very” negative).

Approximately 90 residents are served each year and they range from ages 22 to mid-nineties. Approximately one-half are totally blind and one-half have significant visual impairments, and nearly all have very low incomes.

In a particularly challenging environment of tremendous uncertainty in a State without a budget, Friedman Place was able to provide the services described below plus adopt a 2 ½ year Development Plan, a 3 year Strategic Plan, and purchased a second building, known as the Annex.

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**RESIDENT DEMOGRAPHICS**

- **RESIDENTS ARE ADULTS OF ALL AGES, ALTHOUGH MOST – 65% - ARE OVER AGE FIFTY.**
  - Our youngest resident was 22 years old and the oldest 93
  - 18% of residents are 71 or older
  - 47% of residents are between ages 51 and 70
  - 22% of residents are between ages 41 and 50
  - 13% of residents are between ages 22 and 40
  - The ages of residents has generally stayed the same since the previous year, although the number of younger (40 and under) has increased slightly and oldest (71 or older) has increased slightly.

**Ages of Residents**

- 22 - 40 = 13%
- 41 - 50 = 22%
- 51 - 70 = 47%
- 71 and older = 18%
• **TWO-THIRDS OF THE RESIDENTS ARE MALE AND ONE-THIRD ARE FEMALE**
  
  - 35% of Friedman’s residents are female and 65% male.
  - This ratio is identical to the previous year.
  - This ratio differs from what is found in Illinois and the United States, where there are more women than men who are blind or have vision loss. While 35% of Friedman Place residents are women, approximately 60% of people who are blind are visually impaired overall are women. It is unclear why this would be.

  **The Percentage of Men & Women who are Blind or have Vision Loss:**
  **Friedman Place, Illinois, and the U.S.**

  ![Graph showing the percentage of men and women who are blind or have vision loss in Friedman Place, Illinois, and the U.S.]

  - Friedman Place: 35% Female, 65% Male
  - Illinois: 57% Female, 43% Male
  - United States: 62% Female, 38% Male

• **THE MAJORITY OF RESIDENTS ARE CAUCASIAN, BUT OTHER RACES AND ETHNICITIES ARE REPRESENTED.**
  
  - Asian - 3%
  - Hispanic - 13%
  - African American - 16%
  - Caucasian - 67%
  - Since the previous year the percentage of residents who are ethnic minorities has increased by 7%.

  ![Pie chart showing the resident ethnicity at Friedman Place]

  Resident Ethnicity
  - Caucasian = 67%
  - Asian = 3%
  - Hispanic = 13%
  - African American = 16%
While the statistics describing ethnicity do not reflect the general (visually impaired and non-visually impaired) populations of Chicago or even Cook County, they do generally reflect the population of those with visual impairments across the country. Approximately 79% of persons who are visually impaired or blind are Caucasian, which is higher than Friedman Place’s 67%.

- **ALL OF OUR RESIDENTS HAVE SIGNIFICANT VISUAL IMPAIRMENTS**
  - Forty-five percent our residents experience total blindness and the remaining 55% has significant visual impairments.
  - There is a higher percentage of people who are blind as opposed to visually impaired at Friedman Place when compared to the overall United States, where approximately 31% experience total blindness and 69% visual impairment\(^1\).

- **MOST RESIDENTS HAVE SIGNIFICANT CHRONIC HEALTH ISSUES**
  - 90% of residents have another major health issue besides vision loss, such as high or low blood pressure, diabetes, high cholesterol, heart disease, etc.
  - On average, each resident has 5 chronic health conditions, not including blindness or vision loss.

![Types of Major Health Conditions](chart.png)
• RESIDENTS HAVE A WIDE RANGE OF EDUCATIONAL BACKGROUNDS, COMPARABLE TO THE OVERALL U.S. POPULATION OF PEOPLE WITH VISUAL IMPAIRMENTS
  o One-quarter of residents have a bachelor’s degree, which is the same as the broader visually impaired population.
  o Almost one-half of residents have a high school degree or GED, compared to nearly one-third of the broader visually impaired population.
  o Fifteen percent of residents have less than a high school degree, compared to nineteen percent of the broader visually impaired population.

![Highest Level of Education](image)

• THE AGENCY SERVES APPROXIMATELY 90 PEOPLE PER YEAR.
  o Ninety-two people were served in 2015, four more than in the previous year. The number served typically varies between 88 – 96 people per year.
  o Our number served is more than our capacity since several residents move out of Friedman Place each year and are replaced by new residents.
  o The vast majority of residents who move do so due to their need of a higher level of medical care and support. Most residents who move out move into a nursing home.
  o On average, 82 individuals reside at Friedman Place at any one time.
  o 224 separate individuals have been served between 2010 and 2015.
• NEARLY ALL OF OUR RESIDENTS HAVE VERY LOW INCOMES
  o 98% of Friedman’s residents have incomes at or below the Federal definition of Very Low Income and 66% at the Poverty Level. This is much higher than the 31% of people in the United States with a visual disability who live below the poverty line.
  o 66% of residents have annual incomes at or below $11,770
  o 32% of residents have annual incomes more than $11,770 and less than $25,050.
  o 2% of residents have annual incomes at or above $40,100.

![Resident Incomes](image)

• OVER TWO-THIRDS OF OUR RESIDENTS HAVE LIVED AT FRIEDMAN PLACE FOR AT LEAST FIVE YEARS.
  o 24% have been residents for less than three years
  o 77% have been residents at least three years.
  o 67% have been residents at least six years.
  o 22% have been residents for at least ten years
  o Our longest term resident has been with the agency for almost 25 years
  o The average length of stay is 7.18 years

![How Long Residents have been with Friedman Place](image)
RESIDENT SATISFACTION

FRIDEMAN PLACE 2015 RESIDENT SURVEY SUMMARY

A survey of residents was conducted in the spring of 2015. Several volunteers met individually with each resident to best assure openness and anonymity. Sixty-eight percent of the residents agreed to participate, and most answered all of the questions. The results below are compared to the last Annual Survey, which was completed in the fall of 2013. Many new questions were added in this version so when nothing is listed under the “change” column it means that is a new question so there is no other number with which to compare.

Executive Summary

In 2015 the residents of Friedman place reported that they were generally very satisfied with their home and the services that they receive and that their overall levels of satisfaction have improved over time. Of all the questions that were asked in the last survey and again in this one, 86% of them showed increases in satisfaction and by an average of 10%.

Nearly all residents who completed this survey gave the highest ratings possible to their physical environment, including their apartment, common areas, and maintenance and most of these areas showed an improvement from the last survey. Satisfaction with the activities offered is very high with the two questions that were repeated having scores 20% and 21% higher than before, respectively. While a significant number of residents are not satisfied with the food services, three-quarters of the residents say that the quality of the meals is good or very good and even more than that say that they are satisfied or very satisfied with the meals. Satisfaction with healthcare and social services is extremely high; with nearly all giving these areas the highest scores possible. Similarly high levels of satisfaction are found with questions about the resident’s level of trust with staff and that the staff is courteous and helpful. Questions regarding quality and personal goals indicate that residents feel that the agency has helped them meet their goals and that they make their own lifestyle decisions and nearly all feel safe at Friedman Place.

There are several areas that the survey results indicate that Friedman Place can improve, particularly in the areas of meals and how long it takes to be served, understanding of agency
policies and procedures, and assuring that policies and procedures are applied in a fair, firm, and consistent manner.

**PHYSICAL ENVIRONMENT**
Residents are extremely satisfied with their physical surroundings, with nearly all of them giving the highest (i.e., most positive) scores to questions related to their apartment being homelike, clean, and comfortable; repairs being made in a timely manner; and common areas being accessible and clean.

Of the six questions that were asked in the last survey and again in this one, 5 of them showed increases in satisfaction and by an average of 7%.

<table>
<thead>
<tr>
<th>Item</th>
<th>Score</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. My apartment is homelike or very homelike.</td>
<td>98%</td>
<td>↑ 10%</td>
</tr>
<tr>
<td>The agency set a goal of 90% for this question, which was met and exceeded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. My apartment is comfortable or very comfortable.</td>
<td>96%</td>
<td>↑ 7%</td>
</tr>
<tr>
<td>The agency set a goal of 90% for this question, which was met and exceeded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. My apartment is clean or very clean.</td>
<td>96%</td>
<td>↑ 1%</td>
</tr>
<tr>
<td>The agency set a goal of 90% for this question, which was met and exceeded</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Repairs or maintenance was performed in a timely or very timely manner.</td>
<td>94%</td>
<td>↓ 4%</td>
</tr>
<tr>
<td>5. Common areas accessible or very accessible.</td>
<td>95%</td>
<td>↑ 7%</td>
</tr>
<tr>
<td>6. Common areas clean or very clean.</td>
<td>93%</td>
<td>↑ 11%</td>
</tr>
</tbody>
</table>

**ACTIVITIES**
Residents are very satisfied with the activities and outings and feel that they can give input into what is offered. Of the two questions that were asked in the last survey and again in this one, both showed a significant increase in satisfaction (i.e., 20% and 21%).

<table>
<thead>
<tr>
<th>Item</th>
<th>Score</th>
<th>Change</th>
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</thead>
<tbody>
<tr>
<td>1. I agree or strongly agree that I have opportunities to give input to activities and outings.</td>
<td>87%</td>
<td>↑ 20%</td>
</tr>
<tr>
<td>2. I find the activities and group outings good or very good.</td>
<td>87%</td>
<td>↑ 21%</td>
</tr>
<tr>
<td>3. I agree or strongly agree that I am satisfied with the variety of trips and activities offered outside Friedman Place.</td>
<td>83%</td>
<td></td>
</tr>
<tr>
<td>4. I agree or strongly agree that I am satisfied with the variety of trips and activities offered inside Friedman Place.</td>
<td>83%</td>
<td></td>
</tr>
</tbody>
</table>
5. I agree or strongly agree that the Activities Staff are approachable, courteous, and helpful 95%

**FOOD SERVICES**
Most residents are satisfied with the quality of the meals, with over three-quarters giving them the highest scores to the question about overall quality and 81% to overall satisfaction. Nevertheless, fourteen percent of residents gave the question about food quality the lowest rating possible and 10% the question about overall satisfaction. A significant percentage (32%) are dissatisfied with the time it takes to be served as well as whether the portion sizes are appropriate (29%) and that the food is properly cooked (29%).

<table>
<thead>
<tr>
<th>Item</th>
<th>Score</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I think the quality of meals here is good or very good.</td>
<td>77%</td>
<td>↑ 5%</td>
</tr>
<tr>
<td>The agency set a goal of 85% for this question, which was not met by only 8 points.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. I am satisfied or very satisfied with the meals.</td>
<td>81%</td>
<td></td>
</tr>
<tr>
<td>3. I am satisfied or very satisfied with the flavor of the food.</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>4. I am satisfied or very satisfied with the time it takes to be served.</td>
<td>68%</td>
<td></td>
</tr>
<tr>
<td>5. I agree or strongly agree that the servers are courteous, informative, and responsive to requests for assistance.</td>
<td>82%</td>
<td></td>
</tr>
<tr>
<td>6. I agree or strongly agree that the meals are presented in a manner that lets them know where the different foods are located on the plate and where the drinks and utensils are located.</td>
<td>75%</td>
<td></td>
</tr>
<tr>
<td>7. I agree or strongly agree that the meal portion sizes are appropriate (i.e., neither too large or too small.</td>
<td>71%</td>
<td></td>
</tr>
<tr>
<td>8. I agree or strongly agree that the food is properly cooked (i.e., neither overcooked nor undercooked.</td>
<td>71%</td>
<td></td>
</tr>
</tbody>
</table>

**HEALTHCARE & SOCIAL SERVICES**
Residents are very satisfied with the quality of healthcare that they receive, with nearly all giving the highest scores to questions related to the quality of nursing care and the availability of appropriate healthcare services at the agency. These scores are higher than were reported last year and no residents scored these areas at the lowest level. Nearly all residents are satisfied with the availability of Certified Nursing Assistants and over two-thirds with the Social Work and related services. Of the two questions that were asked in the last survey and again in this one, both showed increases in satisfaction.
1. I agree or usually agree that the health services available at Friedman Place addresses my needs. 93% ↑ 5%

2. I feel the nursing care they get is good or usually good. The agency set a goal of 90% for this question, which was met and exceeded 98% ↑ 10

3. I agree or strongly agree that I am better able to cope with stress and other concerns due to the mental health services provided by the social workers, psychiatrist, and social work interns. 79%

4. I agree or strongly agree that Certified Nursing Assistants are available when needed to provide assistance with daily tasks such as getting ready for the day, bathing/showering, and taking walks. 94%

5. I agree or strongly agree that appointments and other scheduled health-related visits (e.g., doctors, dentists, etc.) are managed in a professional and efficient manner. 83%

GENERAL INPUT AND AWARENESS
Most residents feel that they are given opportunities to provide input to and are aware of agency policies and procedures and to express general concerns. These questions had total scores 2% - 18% higher than what was reported one year earlier. Only a small percentage – between 4 – 6% of the residents – gave the questions about expressing concerns and being made aware of policies and procedures the lowest scores, but a significant number (15%) gave the question about giving input into policies and procedures the lowest scores. Additionally, 25% disagree and 10% strongly disagree with the statement that policies and procedures are applied in a fair, firm and consistent manner.

1. The agency policies and procedures are clear or very clear to me. 77% ↓ 7%

2. I am comfortable or very comfortable asking staff about a policy or procedure when I have a question. 91%

3. I agree or strongly agree that I have opportunities to give input into agency policies and procedures. 77%

4. I agree or strongly agree that the policies and procedures are applied in a fair, firm, and consistent manner. 66%

5. I agree or strongly agree that I have an opportunity to express concerns. 91% ↑ 13%
**Staff Relations**
Most residents feel a sense of trust in the staff and that they are courteous and helpful. These questions had total scores better than the previous year, especially regarding trust, where the score has increased scores 13%.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>1. I agree or strongly agree that the staff are courteous and helpful.</td>
<td>93%↑ 2%</td>
</tr>
<tr>
<td>The agency set a goal of 90% for this question, which was met and exceeded.</td>
<td></td>
</tr>
<tr>
<td>2. I agree or strongly agree that I feel a sense of trust in staff.</td>
<td>96%↑ 13%</td>
</tr>
<tr>
<td>The agency set a goal of 90% for this question, which was met and exceeded.</td>
<td></td>
</tr>
</tbody>
</table>

**Quality and Goals**
Nearly every resident feels safe at Friedman Place and that they make their own lifestyle decisions. Nearly all residents feel that Friedman Place has helped them improve the quality of their life and helped them meet their goals. Most of the questions in this area had improved ratings from the year prior.

<table>
<thead>
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<tbody>
<tr>
<td>1. I agree or agree or strongly agree that Friedman Place has connected me to services not offered in the building but offered in the community.</td>
<td>70%↑ 12%</td>
</tr>
<tr>
<td>2. I agree or strongly agree that Friedman Place has helped me meet my personal goals.</td>
<td>91%↑ 23%</td>
</tr>
<tr>
<td>The agency set a goal of 75% for this question, which was met and exceeded.</td>
<td></td>
</tr>
<tr>
<td>3. I agree or strongly agree that I make my own lifestyle decisions.</td>
<td>98%↓ 1%</td>
</tr>
<tr>
<td>4. I agree or strongly agree that the agency has improved my quality of life.</td>
<td>90%↑ 8%</td>
</tr>
<tr>
<td>5. I agree or strongly agree that staff have encouraged me to learn new skills and become more independent.</td>
<td>82%↑ 31%</td>
</tr>
<tr>
<td>6. I agree or strongly agree that I feel safe here. unchanged</td>
<td>96%</td>
</tr>
<tr>
<td>7. I agree or strongly agree that I would recommend Friedman Place to other adults with visual impairments.</td>
<td>91%↑ 13%</td>
</tr>
</tbody>
</table>


Policies applied in a fair, firm, and consistent manner

Time it takes to be served
Connected to outside services
Satisfied with the flavor of food
Food portion sizes are appropriate
Food is properly cooked
Meals presented so I know where they are
Quality of the meals is good
Policies and procedures are clear
Meals presented so I know where they are
Food portion sizes are appropriate
Satisfied with the flavor of food
Connected to outside services
Time it takes to be served

60% 65% 70% 75% 80% 85% 90% 95% 100%
Comments made by residents as part of the satisfaction survey:

- Friedman is very comfortable, staff friendly and cooperative in addressing all of my needs.
- Everyone here does their job and are friendly and the staff is fantastic.
- Services are good and meet my needs. More Certified Nursing Assistants needed to improve responsiveness for meeting immediate need.
- It’s a great place, everyone is nice, it’s amazing. I was scared to come here, but it has been great, I can’t think of anything to criticize.
- Difficult to control room temp on my own. Residents don't always know the policies and procedures. No good place to give input. At resident meetings, issues are discussed but nothing productive comes of it. Meal temps are sometimes too cold and sometimes too hot. Need bland diet while others want more flavor. No condiments available. Not receiving as much social services as I would prefer. Nursing has improved with change in staff. Staff does not take all residents to appointments.
- People losing their sight need help and could use counseling on a more frequent basis than available here to help them adjust. Also help with obtaining necessary devices, especially cane.
- Need for more arts and crafts. Better system for transportation and doctor appointments. Food could use more flavor. Internet goes down way too much.
- I was happy to come here. Everything has been to my liking.
- Would like more volunteers available
- The shopping and activities they do for us is strongly appreciated, they do a great job.
- Wonderful and enjoy the people
- Thank God I am here
- I would like more assistance when we go out for outings in the community.
- My suggestion is that staff should be more prepared for emergencies.
- Love it here!
- Wish Friedman was more accommodating with hard of hearing individuals. Hard for hearing impaired to deal with residents.
- I would like to suggest that portion sizes should be increased because it is not enough.
- Have more concerts for musicals at Friedman and outings. Have picnic table outside and fire pit and fireplace for staff to operate. Trip to Lake Michigan, museums (Such as Natural History, Science & Industry, Field Museum.) Add healthier food items like Fiber One and Wheat and Grape Nuts.
- The common areas can be used better, such as better equipment for the exercise room and better entertainment options. The rooms aren't necessarily usable by many residents. Would love more games and descriptive movies.
- Opinions are not listened to even though you ask. There are too many people that live here that won't speak up and that make staff think there isn't a problem. The food is awful. The portions are ridiculous.
- Communication with front office not good
- I would appreciate that any new employee that works here is fully aware of who lives here and what the needs are of the residents are as well as have more humanity and sensitivity to helping people with multiple needs. Would like more understanding from new staff members that many residents have / continue to suffer and would appreciate more respect.
• Kitchen services need to improve quality of food and services still, but they are slowly improving. Need to be more accommodating to dietary needs. I haven't been able to meet all of my goals but Friedman Place helps me to work towards them. While Activities listen to residents they do not actually take our ideas and make them a reality. Trust some staff but not others. I have stuff going on individually and it is making it hard to feel safe anywhere so no Friedman Place is not safe but it is better because it is my home.
• I just want to say that it's very good here.
• Friedman Place is a very, very helpful facility, but I feel that a lot of their activities are geared towards older residents instead of making it "all-age friendly" (ie 45 and up). FP is a great facility and I enjoy being here.
• Regarding my experience here, in the 10 years that I've been here, I feel as though I have been cared for in the utmost quality way that I should be. I have been satisfied with the variety of foods that have been presented from around the world.
• Some of the food staff does not help me locate the food on my plate. Sometimes they just put the plate in front of me without identifying where the food is.
• The policies are not always the same for everyone. Sometimes they will transport a resident to a doctor's visit, but not everyone. Some food is not always cooked thoroughly. Some food seems not to be cooked properly, like in a regular oven instead of a microwave.
• Sometimes the food is better than other times; sometimes it's over or under-cooked, but not all the time. If there is something I don't want on the menu, I can always ask for something else. This is a good place for people who have lived with their families and can't totally live on their own. I came here not only to have fun and make friends, but to become as independent as I can. I feel safe knowing that I can be independent, but knowing that there is staff to help me.
• It's taking too long to fix the elevator. I have to wait a long time to be served my meals.
• I've been here 4 years and services are wonderful.
• I'd like to see Friedman Place take more outside trips to amusement parks like Great America or other amusement parks that are similar in the area.
• Friedman Place should keep a supply of canes that residents can purchase to avoid the necessity of ordering from an outside vendor. Some of the food servers seem moody and seem bothered by resident's questions. The Executive Director has created a more vibrant atmosphere with the new staff he has hired. Both staff and residents appear more upbeat because of this.
• There are many inconsistencies with staff communication and services for residents. Staff need better training regarding the challenges of the blind. Sometimes some staff takes a resident's opinion as a criticism; they take these comments too seriously and personally. If you are independent, they sometimes want to do less for you when you really need it. Sometimes kitchen staff are in a horrible mood, like they don't want to be working here or they are bothered by the need to help a resident get turned around in the right direction.
• I think that the agency should be recommended to visually impaired individuals who are living with their families but may need a place to stay for future needs.
• I'm not happy with the amount of money we get to keep. The cost of room and board is too high. The bathroom water is not hot enough and cloudy. Water pressure is too weak. The toilet seat is loose. Internet and cable services are not satisfactory. Overall services have gone downhill since arrival of the new Executive Director.
PROGRAMS & SERVICES

- Provided over **30,000 days and nights of affordable supportive housing** in the last year and 24/7 assistance and services from nurses, Certified Nursing Assistants, activity staff, social workers, and others.

- Provided approximately **80,000 individual balanced, nutritious meals** in the last year, prepared in our own professional commercial kitchen.

- Provided over **8,000 hours of nursing care** in the last year by both Registered and Licensed Practical Nurses. The majority of nursing care is related to medication administration, monitoring, and instruction and the coordination of healthcare services.

- Provided over **22,300 hours of services in the last year by Certified Nursing Assistants**. These services include assistance with and training of bathing, grooming, dressing, health and wellness activities, medication reminders, supervision, coordination of healthcare services, etc.

- Provided over **3,600 hours of services in the last year by social workers**. These services are provided Licensed Clinical Social Workers and between two and three Social Work Interns. Services include a wide range of mental health assessments; individual therapy and counseling sessions; case management; and crisis intervention.

- Provided approximately **40 hours of direct psychiatric care** in the last year. These services are provided by a psychiatrist who meets with residents here in the building and included psychiatric assessments, prescription of medications, and medication monitoring, etc.

- Provided over **40 hours of direct podiatric care** in the last year, mostly to residents with diabetes. These services are provided by a podiatrist who meets with residents here in the building.

- Provided over **100 hours of services from an internist** in the last year. These services are provided by a physician who meets with residents here in the building.

- Provided over **125 hours of orientation and mobility training** in the last year. These services are provided by an Orientation and Mobility Specialist who meets with residents here in the building and provides training to residents so they can better and more independently navigate both the building and neighborhood.

- Provided over **88,000 hours of service by all 65 of our employees**.

- Provided approximately **50 hours of dental services** in the last year. These services are provided by a dentist who meets with residents here in the building.

- Provided over **25 hours of ophthalmological services** in the last year. These services are provided by an ophthalmologist who meets with residents here in the building.
• Provided nearly **2,300 hours of activities** in the last year (a 15% increase from the previous year). The most common activities were music, weaving, shopping, religious services, bowling, healthy snacks, creative writing, advocacy group, concerts, theater, movies, bingo, trivia, musical history, etc.

• Had an **occupancy rate in the last year of 98%** (i.e., all of our apartments were occupied 98% of the time).
  
  o According to the National Investment Center for the Senior Housing & Care Industry, the occupancy rate for independent living properties and assisted living properties averaged 90.5% and 89.0%. Friedman Place’s higher occupancy rate is a sign of the tremendous need that exists for the specialized services that we provide.

• **THERE IS A NEED FOR THE AGENCY’S SERVICES**

  • Approximately 6 people apply each month and 4 more request information without actually applying. Of those who apply, approximately 20% ended up on the waiting list and 9% actually move in. People are put on the Waiting List only when their applications are fully processed and they are deemed eligible.
  
  • Historically, between 6-8 residents move out of Friedman Place per year.
  
  • A total of 63 people applied for services (a 10% increase from the prior year), and of those, approximately 20% were placed on the Waiting List and 9% were able to move in. The rest withdrew their applications or were declined.
  
  • The Waiting List was closed for the beginning part of the year and re-opened in the fall. People waited on the Waiting List between 3 – 6 months for an apartment to become available.
  
  • The application process can vary between 2 – 10 months, usually depending on how long it takes for all the medical records to be received.

• **APPLICANTS HEAR ABOUT FRIEDMAN PLACE MOSTLY FROM PROFESSIONALS**

  • Approximately 50% of applicants (or their family/friends) first heard about Friedman Place from internet sources, particularly our website after doing a generic search.
  
  • Approximately 35% of applicants (or their family/friends) first heard about Friedman Place from other social service or healthcare providers. These include mostly social service agencies that do not specialize in serving people with vision impairments, medical/rehabilitation providers, and shelters.
  
  • Approximately 15% of applicants first heard about Friedman Place from some other source, many from other people in the blind community.
**APPLICANTS TEND TO BE QUITE YOUNGER THAN THE CURRENT POPULATION OF AGENCY RESIDENTS**

- 49% of applicants were 50 or younger, compared with 27% of current residents.
- 40% of applicants were aged 51 – 70, compared with 57% of current residents.
- Only 11% of residents were aged 71 or older, compared with 16% of current residents.

**MORE MEN APPLY THAN WOMEN**

- Fifty-seven percent of applicants were men and 43% women.

**APPLICATIONS ARE “CLOSED” FOR A WIDE VARIETY OF REASONS.**

- Applications were closed 19% of the time because the applicant’s phone was disconnected, letters were returned “no longer at this address”, or phone messages were not returned. We believe that many of these applicant’s needed services much more quickly than could be provided and moved to a less suitable location such as with family, a nursing home, or possibly homelessness. This percentage – 19% - is much lower than the previous year when 47% of applications were closed because of an inability to contact them. It is believed that this change is due to significant improvements in our process which results in applicants getting processed much more quickly and efficiently.

- Main reasons applications were closed
  - Unable to make contact – 19%
  - Required a higher level of medical care – 16%
  - Withdrew application -14%
  - Required a higher level of psychiatric care – 11%
  - Records not received – 11%
- Wanted a one-bedroom apartment instead of a studio – 8%
- Not blind or low vision – 5%
- Guide dog policy – 5%

### FRIEDMAN PLACE PROGRAM DESCRIPTIONS AND GOALS

#### NURSING

**Description:** The Nursing Program consists of the work of licensed practical and registered nurses. Primary services include: Medication administration and management; Initial, annual, and quarterly assessments and service plans; Coordination with the pharmacy and physicians; Health monitoring & education; and serving as key contacts for in-house podiatrist, psychiatrist, optometrist, and primary care physician. Since Nursing works very closely with the Certified Nursing Assistants these programs are sometimes combined for easier discussion and consideration.

**Overall Outcomes:**
- Optimal health and wellness
- Opportunity for learning and increased independence

**Measurement Tools:**
- Documentation (Medication Administration Record (MAR), Physician Order Sheet (POS), etc.)
- Assessments on time and service plans appropriately personalized and updated.
- Facility link and physician sign-in sheets
- Service plans
- Satisfaction Surveys
- File reviews

**Goals:**
1. 100% of medication and physician orders provided accurately
2. 100% Assessments are on time and plans updated
3. 100% of physician appointments are coordinated with no delay
4. 100% of services plans include all needed services
5. 92% of residents will rate the overall quality of nursing care as "good" in FY16 (92% in FY17)
6. 92% of residents will feel that they are better able to cope with stress and other concerns due to the mental health services at Friedman Place in FY16 (95% in FY17).
7. 85% of residents will display low levels of emotional distress in FY16 (90% in FY17)
8. 92% of residents will report that Friedman Place has improved their overall life in FY16 (95% in FY17)
9. 85% of resident service plan goals (aggregate) will be fully or partially accomplished.
10. At least 5% of residents who score 3 on RAI for IADL self-performance (3 is Done by others, resident not involved) will score a 2 or below on their next RAI. Note: This section of the RAI asks questions regarding shopping, finances, light meal prep, housework, laundry, med admin, phone use, transportation arrangement. Interventions
would be resident education, having resident be present when activity is completed by staff, staff education on encouraging independence.

11. At least 5% of residents who score 2 on RAI for IADL self-performance (2 is Done with help) will score 1 (done with supervision) or 0 (done independently).

12. At least 80% of residents will maintain or increase their levels of medication independence. Note: There are four levels (Independent – currently 40.7%, or 33 residents; Independent with med-minder – currently 24.7%, or 20 residents; Med minder with assistance (reminders) – currently 14.8%, or 12 residents, and; Med administration – currently 19.8%, or 16 residents. The 80% target was set in part to accommodate the likelihood that certain residents, particularly our oldest or those who have significant illnesses, will as a matter of ordinary aging and frailty become less independent over time. (this data is from January 2015)

CERTIFIED NURSING ASSISTANTS (CNAs)

CNAs provide a wide range of personal care. There are typically 2-4 CNAs on duty and they work 24/7. Primary services include: Assistance with Activities of Daily Living (ADLs) such as bathing, dressing, grooming, laundry; Reminding resident to take medications; Coordination of medical appointments and arranging/providing transportation, as needed; Light housekeeping; and general monitoring of residents. Since the Certified Nursing Assistants work very closely with Nursing, these programs are sometimes combined for easier discussion and consideration.

Overall Outcomes:
- Optimal health and wellness
- Opportunity for learning and increased independence

Measurement Tools:
- Care sheets
- Appointment calendar in the electronic health records system
- Census
- Service Plans

Goals:
1. 90% of Activity of Daily Living (ADL) assistance provided and documented on care sheets if identified as a need on Resident Assistant Instrument (RAI)
2. 90% of med reminders provided and documented on care sheets if identified as a need on RAI
3. 90% of appropriate transportation provided if unable to travel alone safely.
4. 90% of light housekeeping provided and documented on care sheets if identified as a need on RAI
5. 100% of residents will be monitored and properly reported through the daily census
6. 80% of residents will maintain or increase their independence with ADL’s and decrease CNA assistance.
SOCIAL WORK

Social Workers provide a wide range of clinical and case management services. Primary services include: Case management (e.g., assistance with obtaining and maintaining public entitlements, finding social/recreational/educational, vocational resources in the community, etc.); Individual and group counseling (e.g., issues related to relationships, adjustment to blindness, goal-setting, emotional issues, etc.); Managing the admission process from responding to inquiries, providing tours, completing assessments, etc.

Overall Outcomes:
- Decrease in symptoms from mental health and/or emotional challenges
- Opportunity for learning and increased independence
- Increased participation in counseling and psychiatric services when needed
- Engagement with the broader community, including educational, social, vocational, and recreational activities
- Obtain and maintain public entitlements
- Process comprehensive applications in a timely manner and maintain a Waiting List

Measurement Tools:
- Service plan
- File review
- Maintain waitlist and quick turnover when residents leave Friedman Place
- Satisfaction Survey
- RAI assessment,
- Satisfaction Survey

Goals:
1. 100% of residents that need case management as identified on their RAI have it on their service plan
2. 100% of resident that have mental health concerns as identified on their RAI are provided either in-house or referred out counseling and have it on their service plans
3. 10% of residents will participate in social worker groups
   - 75% of these people will finish the whole group
   - 10% will have an increase on functioning and/or 10% decrease of undesirable symptoms
4. No less than 3 people on the waiting list at all times. When there is a vacancy, it will be filled with a new resident within 30 days.
5. 100% of new residents receive 2 hours of Orientation and Mobility assessment and training.
6. 92% feel they are better able to cope with stress and other concerns due to the mental health services provided by Friedman in FY16 (95% FY17)
7. 85% will show low levels of emotional distress in FY16 (90% in FY17)
8. 92% will report that Friedman has improved their overall quality of life in FY16 (95% in FY17)
The David Herman Learning Center (DHLC) is based at Friedman Place but its activities extend to multiple locations, and formats, both inside and outside of the Agency. The three DHLC areas of focus include: Technology and Adaptive Devices; Education and the Therapeutic Arts; and Entrepreneurial and Vocational Accomplishments.

**Overall Outcomes:**

- empower residents and others who are blind or visually impaired to develop their learning and technology skills to their greatest desire and capacity

**Measurement Tools:**

- Pre-and post-assessments
- File reviews

**Goals:**

1. 50% of technology training participants will show at least one level of improvement in FY16 and 60% in FY17.
2. 50% of therapeutic Weaving participants will demonstrate at least one level of improvement in FY16 and 60% in FY17.
3. 50 residents will be served by the DHLC in FY16 and 60 in FY17
4. 1,550 hours residents will be directly engaged in class or learning in the DHLC in FY16 and 1,600 in FY17

The following programs have a variety of goals and outcomes that typically change more frequently and thus are not listed here. Many of the goals are related to resident satisfaction, number of activities provided, quality and consistency, etc.

**ACTIVITIES**

The Activities Department provides a range of activities both within and outside of the building. Friedman Place provides much more activities than are required by the State regulations and nearly all residents take part in some activities over the course of a year. Primary services include: In -building activities like exercise classes, music events, arts & crafts, crosswords, reading of the newspaper, poetry, computer training, adaptive technology, etc.; Out-of –building activities like bowling, concerts, plays, etc.; Recruiting, orienting, and managing volunteers; Managing the “independent outing” activities which allow residents to go on activities outside the building on their own, with $25 of the cost paid by the agency; Weaving activities; Coordination of Braille and large-print menus and activity calendars and the phone “activities hotline”
KITCHEN / DINING SERVICES

The kitchen serves three meals per day plus an evening snack. Menus are posted in advance and orders are taken a day in advance. Last year the kitchen served over 75,000 individual meals. State regulations require that the meals be prepared on-site by agency employees. Primary services include: 3 meals per day plus evening snack; Meals & snacks for special events (e.g., board meetings, resident dinners/parties with family, various in-building activities, etc.).

HOUSEKEEPING / MAINTENANCE

Housekeepers and maintenance staff work very closely with one another, including maintenance staff doing cleaning when needed or a Housekeeper is on vacation. Primary services include: Cleaning each apartment weekly; Cleaning common areas several times per week; General maintenance and repairs (including preparing apartments prior to move-in).

ADMINISTRATION

While administrative staff often supports activities of other departments, primary services include: Financial management; Human resources; Front desk staffing; Billing to the state & insurers; Quality assurance (both clinical and non-clinical); Resident lease management; Staff training; etc.

DEVELOPMENT

Development & Communications encompasses the preparation of foundation and corporation grant proposals and progress reports, individual appeals, newsletters, special events, and related activities that affect the “face” or brand of the agency. Primary services include: Preparation of foundation & corporate grants & reports; Individual appeals; Newsletters/publications; Major gifts; Events; etc.

QUALITY MEASURES

- **THE AGENCY HAS A ROBUST AND COMPREHENSIVE QUALITY ASSURANCE PROGRAM IN ORDER TO SUPPORT AND MAINTAIN VERY HIGH QUALITY SERVICES.**

  - A sample of resident files are reviewed on a monthly basis and all are reviewed at least once annually.
**Assessments & Service Plans:** Nurses complete Resident Assessments/Service Plans Quarterly. Assessments are comprehensive instruments that consider a broad range of physical and psychological health and functioning, including health conditions; cognition; vision; communication; mood and behavior; physical functioning; nutrition; activities; treatments, etc. Service Plans detail needs, interventions, and goals.

Note that the agency’s own expectations are higher than those of the State of Illinois, so while not being on time is a problem in the agency’s view, it may not be by the State of Illinois.

![On Time Assessment / Plan Completion](chart)

**Care Sheets:** Certified Nursing Assistants provide a wide range of services to residents that are identified in the Assessments and outlined in the Service Plans. Services such as medication reminders, laundry and hygiene assistance, taking of vital signs, etc. are documented on “Care Sheets” to assure completion.

![Care Sheet Completion](chart)
Authorization for Release of Information: In order to support the autonomy and independence of Nurses and Social Workers complete Release of Information forms annually with residents so we can coordinate care with doctors, family and other providers. The lack of a release does not indicate that any information was properly released, only that the Agency did not proactively get the release forms signed well in advance in order to improve efficiency.

<table>
<thead>
<tr>
<th>Percent of Residents with Proper Release of Information For Healthcare Providers and/or Family Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qtr 1</td>
</tr>
<tr>
<td>90%</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Advance Directives Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qtr 1</td>
</tr>
<tr>
<td>75%</td>
</tr>
</tbody>
</table>

Resident Involvement in Service Planning: Residents and Nurses review Service Plans on a quarterly basis. Nurses document resident involvement in service planning in their Quarterly Evaluations.
**Rights Notifications:** There are a variety of notifications provided to residents annually. These include Health Insurance Portability and Accountability Act (HIPAA) and Privacy Policy and Resident Rights. 100% of residents were informed of HIPAA and Resident Rights in 2015.
2015 All Staff Training

Staff are required to complete orientation and annual training that covers resident rights; infection control; crisis intervention; prevention and notification of abuse, neglect and financial exploitation; behavioral intervention; tuberculosis identification, prevention, control and reporting; and encouraging independence.

- Back Injury Prevention
- Preventing Harassment in the Workplace
- HIPAA Security Rule
- Tuberculosis-Prevention, Identification and Reporting
- Resident Rights
- Orientation & Mobility 102
- Preventing, Recognizing an Reporting Resident Abuse
- Emergency Contingency Training and Drills
- Crisis and Behavioral Intervention
- Infection Control
- Promoting Interdependence
- Assistive Technology Device Training

2015 Department Specific Training

- Staff are required to complete training related to their area of work and specific population served.
- Advance Directives
- Golden Thread in Documentation
- Cultural Competence
- Identifying and Responding to Workplace Violence
- Professional Boundaries
- Time Management
- Dental Health
- Kitchen Sanitation

- 41% OF OUR STAFF IS TRAINED IN CPR & FIRST AID
GOALS AND OUTCOMES

- THE AGENCY HAS ACCOMPLISHED A WIDE RANGE OF GOALS AND OBJECTIVES
  
  o Note: Some of these objectives were done as part of grants that covered a portion
  of the prior year, but all included all or a portion of 2015. The language and
  formatting varies depending on funder requirements.

1. Enable blind and visually impaired residents of Friedman Place to receive dental care.

While this goal was **FULLY ACHIEVED** at the time of our initial report the grant funding
provided our residents access to dental care to date and will through the funding period of
September 1, 2015. All residents have been involved in and gained access to dental care through
this grant and the services that it supports.

2. Encourage and support dental hygiene among our residents.

While this goal was **FULLY ACHIEVED** at the time of our initial report the grant funding
provided our residents dental hygiene support to date and will through the funding period of
September 1, 2015. The increased skills developed through the staff training has made good
dental hygiene a major focus the residents.

3. Twenty Friedman Place healthcare staff will receive at least six hours of training on
   how to best educate and train residents to perform basic ongoing dental care on
   their own and accept the services of a dentist.

This goal was **Partially ACHIEVED** through five training sessions on 1/22/15, 1/27/15,
1/29/15, 7/16/15 and one is planned for 8/16/15. Each session lasted 1.5 hours, 26 staff attended
at least 1-1.5 hour training session for a total of 70.5 hours of training. Although the goal was set
just for healthcare staff, 6 residents heard about the training and attended too.

4. Eighty-Five eligible residents will receive individual oral hygiene education and
   ongoing support in implementing and maintaining oral hygiene practices.

While this goal was **FULLY ACHIEVED** at the time of our initial report the grant funding
provided our residents dental hygiene support to date and will through the funding period of
September 1, 2015. Eighty-seven residents received individual oral hygiene education and
ongoing support in implementing and maintaining oral hygiene practices.

5. One hundred and twenty-five dental exams, cleanings, and/or other procedures will
   be provided.

This goal was **FULLY ACHIEVED and EXCEEDED** through 55 dental exams, 58
cleanings, 5 denture services, 5 other treatments that include x-rays and also 65 oral hygiene education lessons for Freidman Place residents being provided. A total of 123 procedures were provided at the time of this report and we anticipate that we will provide another 45 exams, cleanings, denture services and other treatments prior to the September 1, 2015 grant funding period. This estimate is based on previous ISDS grant dental services history.

Goals: Increase & sustain independence, participation, and safety of Friedman Place residents

| Objective: Develop individualized life skills training and support plan for all residents who need assistance in mastering activities of daily living | Met |
| Objective: Provide life skills training and support, under supervision of OT/PT, for 20 un-/underinsured residents (2 hours per week for 12 weeks) | Met |
| Objective: Provide appropriate adaptive devices for Medicaid-insured residents who cannot afford them | Met |

Expected outcomes:  

| Of Friedman Place residents who work with OT/PT, 95% will demonstrate an average 35% reduction in assistance needed to negotiate their apartments and the common areas of the facility during the grant year. | Fully met and exceeded: 100% demonstrated an average 35% reduction. |
| Of the 20 residents who receive life skills training, 90% will demonstrate an average 35% reduction in the assistance needed for activities of daily living by the end of the grant year. | Not met: 69% demonstrated an average 35% reduction. |
| Of the 20 residents who receive life skills training, 50% will demonstrate an average 35% reduction in the assistance needed for more complex instrumental activities of daily living by the end of the grant year. | Fully met and exceeded: 63% demonstrated an average 35% reduction. |
| 90% will be satisfied with the quality of the life skills training. | Fully met and exceeded: 100% were satisfied with the quality of the life skills training. |

Friedman Place Mid-Year Report
For Fiscal Year 15 (July 1, 2014 – June 30, 2015)

<table>
<thead>
<tr>
<th>Expected Outputs</th>
<th>FY14 Actual</th>
<th>FY15 Goal</th>
<th>FY15 Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td># of residents served</td>
<td>88</td>
<td>88</td>
<td>93</td>
</tr>
<tr>
<td># of residents served by Learning Center</td>
<td>n/a</td>
<td>40</td>
<td>57</td>
</tr>
<tr>
<td>Expected Outputs</td>
<td>FY14 Goal</td>
<td>FY14 Actual</td>
<td>FY15 Goal</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------</td>
<td>-------------</td>
<td>-----------</td>
</tr>
<tr>
<td># of residents served</td>
<td>90</td>
<td>88</td>
<td>88</td>
</tr>
<tr>
<td># of residents served by Learning Center</td>
<td>n/a</td>
<td>n/a</td>
<td>40</td>
</tr>
<tr>
<td># of hours residents are directly engaged in class or learning</td>
<td>n/a</td>
<td>n/a</td>
<td>1,500</td>
</tr>
<tr>
<td>% of residents complying with medical appointments</td>
<td>90%</td>
<td>91%</td>
<td>90%</td>
</tr>
</tbody>
</table>

Friedman Place End-of-Year Report
For Fiscal Year 15 (July 1, 2014 – June 30, 2015)
<table>
<thead>
<tr>
<th></th>
<th>Goal</th>
<th>Actual</th>
<th>Goal</th>
<th>Actual</th>
<th>Goal</th>
<th>Actual</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of residents who rate overall quality of nursing care as &quot;good&quot;</td>
<td>90%</td>
<td>88%</td>
<td>90%</td>
<td>98%</td>
<td>92%</td>
<td>n/a$^4$</td>
<td>92%</td>
</tr>
<tr>
<td>% of residents will feel they are better able to cope with stress and other concerns due to the mental health services at Friedman.</td>
<td>90%</td>
<td>64%$^1$</td>
<td>90%</td>
<td>79%</td>
<td>92%</td>
<td>n/a$^4$</td>
<td>95%</td>
</tr>
<tr>
<td>% of residents displaying low levels of emotional distress</td>
<td>80%</td>
<td>87%</td>
<td>80%</td>
<td>90%</td>
<td>85%</td>
<td>92%</td>
<td>90%</td>
</tr>
<tr>
<td>Technology training participants who show at least one level of improvement</td>
<td>n/a</td>
<td>n/a</td>
<td>30%</td>
<td>44%</td>
<td>50%</td>
<td>53%</td>
<td>60%</td>
</tr>
<tr>
<td>Therapeutic Weaving participants who demonstrate at least one level of improvement</td>
<td>n/a</td>
<td>n/a</td>
<td>30%</td>
<td>62%</td>
<td>50%</td>
<td>45%$^5$</td>
<td>60%</td>
</tr>
<tr>
<td>Residents will report that the agency has improved their overall life.</td>
<td>90%</td>
<td>82%$^2$</td>
<td>90%</td>
<td>90%</td>
<td>92%</td>
<td>n/a$^4$</td>
<td>95%</td>
</tr>
</tbody>
</table>

**Note:** Given the timing of this report – several months before the end of the 2016 fiscal year - percentages were estimated based on the actual numbers for the first seven and a half months of the year.

1. The drop in coping in FY14 was due, we believe, in the rise in the number of residents with significant mental health and psychosocial issues that were not fully met by the agency’s 0.5 FTE professional social work staff. In response, we increased our professional social work staff in the spring of 2014. The percentage increased almost 25% one year later.

2. The drop in the percent of residents reporting that the agency improved their overall life in FY14 was anticipated to be addressed and increase as the professional staff newly hired in the spring of 2014 worked with the residents. The percentage increased almost 10% one year later.

3. The number of hours residents directly engaged in learning was higher than expected largely due to the involvement of two interns who provided 120 and 20 hours of technology training, respectively, over the summer of 2015.

4. This item is only measured annually, as part of each spring’s Satisfaction Survey, so data is not yet available.

5. The result for Therapeutic Weaving was 5% below the goal. We believe this is due to the challenges inherent for anyone who is learning weaving, and especially for those who are blind.
EMPLOYEES & VOLUNTEERS

- **FRIEDMAN PLACE'S 65 EMPLOYEES REMAIN WITH THE AGENCY, PROVIDING A SKILLED AND STABLE WORKFORCE**
  - 43% of the employees have worked for the agency for at least 3 years.
  - 35% of Friedman Place employees have worked for the agency continuously for at least 5 years.
  - 12% of Friedman Place employees have worked for the agency continuously for more than 10 years.
  - These percentages have not significantly changed from the previous year.

- **FRIEDMAN PLACE'S 65 EMPLOYEES ARE ETHNICALLY DIVERSE**
  - 20% Hispanic
  - 11% Asian
  - 28% Black
  - 34% White
  - 7% Other
  - While the agency employs the same total number of people than the previous year, a significantly higher number are ethnic minorities – an increase from 44% to 66%.

- **MOST EMPLOYEES ARE FEMALE**
  - 70% Female
  - 30% Male
  - The ratio of male and female employees has remained the same as in the previous year.

- **FRIEDMAN PLACE'S 65 EMPLOYEES SPAN A WIDE AGE RANGE**
  - 12% ages 61 or over
  - 37% ages 41 – 60
  - 23% ages 31- 40
  - 27% ages 30 or under
  - The age range of employees has remained essentially the same as in the previous year.

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Friedman Place Employee Survey
Fall 2015

In October of 2015, an electronic survey was sent to all employees. The responses were anonymous and 75% of employees completed the survey. The only demographic information collected was length of time as an employee – in order to assure anonymity - and based on that and the number of employees who responded, the results are considered representative of the agency as a whole.
Of the eight questions asked, the first six were identified in a national survey of employees in all industries as the most important measures of employee engagement. That survey was conducted by the Society for Human Resource Management in 2015. The remaining two questions, feeling respected by residents and satisfaction with the physical environment were not included in the national survey.

All questions offered five possible answers from best to worst on a Likert scale. For example with the question “How satisfied are you with your compensation / pay?” the options were:


Summary & Conclusions

The vast majority Friedman Place employees are extremely engaged and their responses indicate levels of satisfaction more than double than those found nationally in every area considered. When employees did not give one of the best responses to the individual questions they almost always gave a neutral response (e.g., “neither satisfied nor dissatisfied”). Of all the individual answers given, 73% were positive, 20% were neutral and only 7% were negative (and regarding negative answers, only one percent of the total questions answered were answered “very” negative).

The questions with the highest scores were:

- How good is your relationship with your immediate supervisor? (90% positive)
- How satisfied are you with the physical work environment and equipment? (88% positive)
- How respectful is the treatment of all employees at all levels? (76% positive)

The questions with the lowest scores were:

- How satisfied are you with you benefits overall? (56% positive)
- How satisfied are you with you compensation / pay? (63% positive)
- How secure do you feel in your job? (65% positive)

It is believed that response regarding benefits is primarily an expression of dissatisfaction with the amount of paid time off provided and the question regarding job security has largely to do with the State of Illinois’ financial problems. Although the question regarding feeling treated respectfully by residents scored in the middle, it is believed that this is a much more significant issue for kitchen staff, Certified Nursing Assistants, and Front Desk Staff and is largely the result of the behavior of a small group of approximately 10 residents. It was decided that the issues of respectful treatment by residents and satisfaction with benefits will be the primary focus of the Improvement Plan for the next two years.
# RESULTS

<table>
<thead>
<tr>
<th>Question</th>
<th>Best Scores</th>
<th>Neutral</th>
<th>Worst Scores</th>
</tr>
</thead>
<tbody>
<tr>
<td>How satisfied are you with your compensation / pay?</td>
<td>63%</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>How satisfied are you with your benefits overall (insurance, paid time off, TDA retirement, etc.)?</td>
<td>56%</td>
<td>32%</td>
<td>12%</td>
</tr>
<tr>
<td>How respectful is the treatment of all employees at all levels?</td>
<td>76%</td>
<td>20%</td>
<td>4%</td>
</tr>
<tr>
<td>How good is your relationship with your immediate supervisor?</td>
<td>90%</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>How secure do you feel in your job (i.e., that it is not at risk)?</td>
<td>65%</td>
<td>284%</td>
<td>7%</td>
</tr>
<tr>
<td>How much trust do you feel between yourself and senior management?</td>
<td>68%</td>
<td>27%</td>
<td>5%</td>
</tr>
<tr>
<td>How satisfied are you with the physical work environment and with the equipment you have been given to do your job?</td>
<td>88%</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>How respected do you feel you are treated by residents?</td>
<td>76%</td>
<td>20%</td>
<td>4%</td>
</tr>
</tbody>
</table>

The charts below indicate the percent of staff that indicated the best answers, compared with the results of a national employee survey conducted by the Society for Human Resource Management in 2015. All of the questions except those regarding feeling respected by residents and satisfaction with the physical environment were those that the national survey indicated were most important to employees.
0.76

0.68

0.56

0.63

Respectful treatment of all employees
Trust between employees and senior management
Satisfaction with benefits
Satisfaction with compensation / pay

Friedman
National Survey

0.33
0.28
0.27
0.24

20%
30%
40%
50%
60%
70%
80%

Job security
Good relationship with supervisor
Satisfaction with environment & equipment
Respected by residents

Friedman
National Survey

0.65
0.9
0.88
0.76

0.32
0.4

20%
30%
40%
50%
60%
70%
80%
90%
100%
THE AGENCY BENEFITTED FROM THE USE OF THE SERVICES OF 128 VOLUNTEERS IN THE LAST YEAR, AN INCREASE OF ALMOST 30% FROM THE PREVIOUS YEAR.

Friedman Place Strategic Plan for Fiscal Years 16 -18
(July 1, 2015 – June 30, 2018)

Friedman Place board and staff will build a governance infrastructure that is nimble, responsive, and prepares for the future needs of its residents, members of the community who are blind or visually impaired, and its diverse set of stakeholders.

- Build a governance model that reflects the current needs of the organization as well as the future needs of Friedman Place effectively transitioning to the new model by September, 2016.
- Develop clear job profiles for board, senior executive, and other volunteers identified in the governance model.
- Create tools and processes for board development, performance criteria, succession planning, etc.
• Hire and orient a permanent Executive Director. Support ongoing development of senior team.
• Develop a short– and long– term resource development strategy with a focus on providing continued organizational stability and the ability to expand sustainable services and programs in response to community need.

Friedman Place will provide accessible, relevant, and high-quality programs and services to its residents and others in the community of blind and visually impaired people.

• Friedman Place will evaluate all current programs and services and develop metrics based on the mission and vision of the organization.
• Friedman Place and/or its partners will develop and deliver new programs and services to meet the needs of adults who are blind or visually impaired.
• Develop activities and experiences within the David Herman Learning Center that drive the strategic directions of Friedman Place.

To strengthen and enhance relationships within our residential community, the external community we serve, and the broader community of persons with disabilities.

• Enhance engagement of residents, employees and volunteers.
• Engage external partners in strategic and systemic way.
• Identify opportunities to participate in the larger disability community.

THE ANNEX

In August of 2015 the Agency purchased the building immediately next door to our main building and for the time being is calling it the “Annex”. It is a two-story building with approximately 3,500 square feet of useable space. The first floor consists of a very large open space which will be used for our Weaving Studio and two offices. The second floor consists of a three-bedroom apartment which will be used as a Transitional Housing Program. Major renovations began in the fall of 2015 and are expected to be completed in the spring of 2016.

A breezeway will be constructed to provide an enclosed hallway between the two buildings.

FINANCES

(This information is from fiscal year FY15: July 1, 2014 – June 30, 2015)

• FRIEDMAN PLACE SAVES TAXPAYERS MONEY AND KEEPS PEOPLE OUT OF NURSING HOMES
  o The State of Illinois pays Friedman Place less than 50% of what it pays to the average Nursing Home in Illinois for each resident.
- Since without Friedman Place, most residents would end up in nursing homes, the agency saves the State of Illinois and its taxpayers approximately $20,000 per resident per year.
- Since without Friedman Place, most residents would end up in nursing homes, the agency saves the State of Illinois and its taxpayers approximately $1,500,000 per year.
- Friedman Place receives 33% of our income directly from government sources, which is much lower than most nonprofit organizations of our size.

**Tax Dollars Saved through Friedman Place keeping People out of Nursing Homes (cumulative)**

- $1,500,000
- $3,000,000
- $4,500,000
- $6,000,000
- $7,500,000

<table>
<thead>
<tr>
<th>Year</th>
<th>Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>$1,500,000</td>
</tr>
<tr>
<td>2012</td>
<td>$3,000,000</td>
</tr>
<tr>
<td>2013</td>
<td>$4,500,000</td>
</tr>
<tr>
<td>2014</td>
<td>$6,000,000</td>
</tr>
<tr>
<td>2015</td>
<td>$7,500,000</td>
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</tbody>
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- **THE AGENCY IS EFFICIENT IN HOW IT SPENDS MONEY, ASSURING THAT AS MUCH AS POSSIBLE GOES TO DIRECTLY BENEFIT THE RESIDENTS.**

- Nearly all of the agency’s expenses go directly towards programs and services. Eighty-five percent (85%) of expenses went directly to programs and services, which is much higher than the minimum 65% recommended by the Better Business Bureau’s Standards for Charitable Accountability and 60% by the American Institute for Philanthropy.
- Friedman Place spends 85 cents of every dollar on resident services and programs and only just 15 cents on administration costs.

**Percent of Expenses Spent on Services**

<table>
<thead>
<tr>
<th>Year</th>
<th>Expenses Spent on Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>84%</td>
</tr>
<tr>
<td>2012</td>
<td>84%</td>
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<tr>
<td>2013</td>
<td>85%</td>
</tr>
<tr>
<td>2014</td>
<td>82.5%</td>
</tr>
<tr>
<td>2015</td>
<td>85%</td>
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</tbody>
</table>
THE PERCENTAGE OF EXPENSES FRIEDMAN PLACE SPENDS ON SERVICES AND PROGRAMS IS BETTER THAN MOST SIMILAR AGENCIES.

- One of the ways Friedman Place compares itself to similar organizations is by the amount of money we spend on programs and services as compared to administration and fundraising.
- Friedman Pace has chosen 5 nonprofit organizations in Illinois that provide similar services – affordable housing and support services - against whom to benchmark. Most of the other agencies are based in Metropolitan Chicago, provide similar services, and have budgets roughly the same size as Friedman Place.

![Friedman's Program Expenses vs. Similar Nonprofits](chart.png)
• THE AGENCY HAS A DIVERSIFIED STREAM OF FUNDING, WHICH IMPROVES STABILITY.

  o Last year, a little over 30% of our funding came from the government (which is a much lower percentage than many nonprofits of our size) and was 10% less as a percentage than the previous year. Just over 50% came from program fees and the remainder from fundraising and other sources.

• THE AGENCY ADHERES TO ITS BUDGET AND IS EFFICIENT IN HOW IT SPENDS MONEY.

  o Over the previous four years, the agency ended three years with surpluses and one with a small deficit. Over the entire four year period, the agency raised $275,000 more than it spent, which is approximately 2 percent of the total expenses over the four years. This “rainy day fund” can then be available for urgent needs such as building repairs, etc.
• **THE AGENCY’S BUDGET HAS GROWN IN RECENT YEARS.**

  o Between 2011 and 2015 total expenses increased by over $400,000, or 14%.

  ![](chart_expenses.png)

• **THE AGENCY HAS REDUCED ITS DEBT**

  o In recent years, the agency has reduced the total amount of money owed to others by $633,000, or 21%.

  ![](chart_liabilities.png)
- **THE AGENCY SPENDS A LOT ON BIG-TICKET ITEMS TO MAINTAIN THE BUILDING.**
  - The agency spent almost $150,000 on Capital (Fixed) Assets, which are items of significant value that will be useful beyond a single year. For example, $40,000 was spent on a new comprehensive phone system for the entire building and $30,000 for electronic cabling throughout the building and $35,000 to replace a component of the air conditioning system.

- **THE AGENCY SPENDS A LOT TO MAINTAIN THE BUILDING.**
  - Friedman Place typically spends on average $450,000 each year to maintain the building’s excellent condition. In 2015, we spent $310,000.
• THE AGENCY IS CAREFUL AND CONSERVATIVE IN ITS FINANCIAL APPROACH AND HAS ENOUGH SAVINGS TO MEET ITS OBLIGATIONS.

  o The Current or Working Capital Ratio measures the ability to pay debts owed in the next year with cash that is now or will shortly be available. It helps answer the questions “Do you have enough money to pay your debt?” A score of at least one means that there is enough money available to meet the next year’s debts. A score less than one is generally considered a problem. Friedman Place ended its most recent year with a score of 2.9, which is a very positive indicator.

• THE AGENCY IS CAREFUL AND CONSERVATIVE IN ITS FINANCIAL APPROACH AND HAS ENOUGH SAVINGS TO MEET ITS OBLIGATIONS.

  o Cash available is a measure of how long an organization could continue operating normally and still pay its bills if all income/revenue stopped. It helps answer the questions “Do you have enough money to pay your debt?” The number of months of cash available varies from one organization to another, but three months is a common goal of many nonprofits. While at the end of Fiscal Year 2015 Freidman Place had just under one month cash on hand, at the end of December 2015 we had just over two months of cash on hand.
• THE AGENCY IS WORTH MORE THAN IT WAS FOUR YEARS AGO; THE AMOUNT OF NET ASSETS HAS INCREASED.

- Assets are the value of everything that the organization owns: money, investments, property, equipment, vehicles, etc. Net assets are the value of everything the agency owns (the assets) minus all the liabilities and debt that the agency owes. Net assets are often thought of the “worth” of the organization.
- The net assets of the agency have increased by approximately $245,000 or about 8%, in the last five years.