



Caring for you, Caring for your home

2010 Annual Report

What's in a Number?

29

The years Surrey Services for Seniors has been helping older adults live at home with independence and dignity in Chester and Delaware Counties.

The number of Surrey members.

3,500

36,000

The hours Surrey's dedicated volunteers have donated to our community of members — *neighbor helping neighbor.*

This is the number we care most about — **YOU!**

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OUR MISSION

Surrey Services helps older adults to live at home with independence and dignity and to continue as active members of the community.



brenda carpenter photography



2009 – 2010 Board of Directors

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Dear Friends,

July 1, 2009 – June 30, 2010 was an exciting and challenging time. For me, it was a year of meeting new people, listening and learning from them. From policy makers to funders, from West Chester to Philadelphia, from corporate groups to individuals, my mission was to learn from the community and our members.

From the community I learned that Surrey has a great reputation. At meetings all over the region someone would say “Oh I know Surrey, my family member used your services. . . .” On the other hand, Surrey is a multi-faceted organization so the person who knows about transportation does not know about home care. Or the person who uses the consignment shop is not aware of other programs. Our constant challenge is to communicate the scope of Surrey’s services.

From our members I learned about their broad range of interests and viewpoints, and the life skills they bring to Surrey. In January we formed a Member Advisory Group. The purpose was for members to share their perspective on the interests and concerns of the older adult, to help us identify needs and design appropriate programs and services.

Volunteers had a voice too. The volunteer committee for The Main Line Antiques Show was adamant that we continue with this fundraising event after the prior chair resigned from the committee. Since January 2010 Surrey has been involved in a civil action in which Surrey is accused by the former chair and her husband of trademark infringement regarding the use of the mark “THE MAIN LINE ANTIQUES SHOW.” Surrey filed counterclaims against the former chair alleging trademark infringement of the same mark. Both parties filed cross motions for preliminary injunction. A hearing was held on the preliminary injunction and on September 7, 2010, the court filed its Report and Recommendation in favor of Surrey. The law firm Woodcock Washburn donated professional services for the litigation, in addition to the legal representation provided through our Directors and Officers insurance coverage. What an education this was with respect to the power, passion and process of a volunteer program.*

One of the five critical paths defined in Surrey’s strategic plan was to seek partnerships. It is clear that partnerships map the way to future success. From program partners such as Daemion Counseling and Main Line School Night to Surrey@The Hickman (see page 3) we learn from each other, share resources and expand our capacity to serve our community.

A second critical path of the strategic plan was to make sure Surrey built comprehensive home programs to support its mission. To that purpose, a Home Care Task Force, comprised of board members and volunteer business professionals, examined Surrey’s home care strategy. They analyzed current services and concluded that we should add skilled services such as wound care, tube feeding and other procedures that fall into the “self-administered” category. These additional services reflect changes in the health care arena. The team also worked with staff in applying to the Pennsylvania Department of Health for licensure as a Home Care Agency. This licensure went into effect in February 2010.

Thank you for your continued support of Surrey’s mission.

Barbara J. Fentress
 Barbara J. Fentress, President

* Update: we received notice that the Federal Judge upheld the Magistrate Judge’s recommendation in favor of Surrey.

Surrey@The Hickman: Extending Services into West Chester

In the fall of 2009, Surrey entered into discussion with The Hickman, a residential and assisted living facility in downtown West Chester, to develop a collaboration to serve the needs of the greater West Chester senior community.

Under the leadership of Barbara Fentress and John Schwab, President of The Hickman, senior staff from both organizations began a series of exploratory discussions which have resulted in a working relationship — one that provides great opportunities for positive growth for both organizations.

This initiative is in response to the specific needs and interests of our members, and our Board's strategic vision to partner with a well-established and reputable organization in the West Chester area.

The Hickman is a non-profit, Quaker-sponsored facility with a 120 year history, serving older people of all races and faiths. It has a distinctive mission to serve as a home to older women and men, many of limited means, providing high quality services with dignity and compassion.

Surrey's desire is to complement The Hickman's model of independent living, one which shares our core values, with Surrey's expertise in transportation, home care and community-based services including home maintenance and daily money management.

Thanks to the generous support of ENDO Pharmaceuticals, who responded to our grant request with a \$50,000 donation, Surrey's initial focus is an outreach program to residents of The Hickman and to West Chester's community of older residents.



Elizabeth Bush and Katie Meginniss from ENDO Pharmaceuticals with Barbara Fentress and David Levine, Chairman of the Surrey Board of Directors.

Escorted transportation services provide an affordable and reliable service, and have been in high demand, especially for residents with mobility restrictions.

In addition to offering home care and daily money management, recruiting community volunteers has been a focus in order to extend our mission of *neighbor helping neighbor* by getting involved with Surrey@The Hickman.

“The services have been seamless, and Surrey’s philosophy carries through with Liz. She has established relationships with the residents, and is part of the family here. Going to the doctor at 85-90 is stressful, and having an escort means the world. We have also used Daily Money Management, RN Case Management, and Home Health Care. The people of Surrey couldn’t be better partners — from Liz to Barbara. It’s a win-win for everybody!”*

— Marilee Mohr, Vice President at The Hickman

* Liz Farina, Surrey@The Hickman Coordinator

*Surrey provided a total of **15,348** rides to nearly **600** seniors.*

*Surrey’s shared ride program helped **335** seniors. For **264** seniors too frail to use the shared ride program, volunteers in the driver escort program provided rides and support to get in and out of doctors’ offices, grocery stores and other appointments and errands.*



Surrey's Home Care: Centered on the Person

Surrey's Home Care defines success as meeting the needs of each individual involved — the members, the families, and the caregivers. By focusing on the people involved in each situation, we are able to meet personal needs and offer personal touches that ensure member satisfaction, bring peace of mind to the families, and give us lasting relationships with great caregivers.

“What makes us unique,” says Barbara Fentress, President, “is that we can offer a wide array of services to our members. Our focus is not that they survive, but that they *thrive*.”

“Communication with family members is a priority. We encourage the family to call — we call them back right away, listen carefully, and address things in a timely manner to our fullest capacity.”

Gerri Cunliffe has been a Surrey caregiver for almost 20 years. She attributes her longevity to the relationship she has with members, the caring nature of the office staff, and the caregivers themselves. Gerri says, “What I like most about Surrey is the tremendous care that goes in to matching the caregivers with the people we assist. Surrey focuses on both the needs and personalities in each individual situation to ensure the best possible match.”

For the last six years, Gerri has been working for two women who are sisters-in-law. One of them uses a walker and the other uses a cane. She schedules doctors' appointments, helps them with showering and exercising, reminds them about taking medications, helps them pick out birthday cards for their grandchildren, reads them their mail, and communicates regularly with their families.

“It is getting harder for them to get out — it's getting scary for them,” says Gerri. “I take them shopping, to doctors' appointments, drives through Valley Forge Park. We talk a lot and have really good discussions about family, politics, and their prior work experiences. They say ‘I love you,’ when I leave, and I say ‘I love you, too.’ It makes me happy to be around them. They remind me of my grandmother. I wish I could take away their pain.”

“When one of them was taken by ambulance to the hospital, the other called me at home. Neither of us could reach her son, so I left my Sunday dinner with my family to go be with her. Later, I helped her move into her son's house until the other sister returned home.”

Barbara Fentress says, “The people of Surrey are committed to its mission, and fulfill that mission every day. I can't think of a need that the elderly have that is not being met under the umbrella of Surrey. Caregivers love their clients — people really do care.”

Gerri has the perspective that comes from being with the organization for a long time and knowing the whole picture. She is familiar with all the resources here and can access them to meet the member's needs as they change over time, delivering care that is truly centered on the individual.

It's caregivers with longevity like Gerri Cunliffe who take a professional approach to their careers, and who have demonstrated their dedication to meeting individual needs that make Surrey Home Care unique.

*Surrey Home Care provided **116,692** hours of personal care and home cleaning services for **280** seniors in FY10. This represents a **22%** increase from 2009 in the number of service hours provided.*

*Last year, **7,202** nutritious home-cooked meals were served in the Surrey Café.*

***195** Surrey members received free health insurance counseling and tax preparation assistance.*

Senior Volunteers Embrace Technology

Come upstairs any day at Surrey House in Berwyn, and you will see four or five Surrey members at work, volunteering in our computer room. The spirit of camaraderie is apparent to everyone as laughter is heard above the sound of the printer and the keyboarding. These dedicated volunteers process critical daily transactions on ACT!, our membership database, Raiser's Edge, our donor database, and QuickBooks, our financial program. They produce presentations, special reports, invitations, and event programs using Publisher, PowerPoint, and Word.

At the heart of it all is Jane Sofield, recognized last year as one of Surrey's "Angels" for her years of devotion. At 81, Jane has been retired from MetLife for 19 years, but has kept learning computer skills and is now celebrating seven years as a savvy volunteer — an aficionado with the software we use here every day.

When she was first approached to volunteer, Jane said she responded, "Yes, if I can do computer work!" Her quest to learn and be challenged has kept her moving between volunteer jobs. Since becoming proficient on ACT! and QuickBooks, Jane moved on to producing the event program and a slide show for the Surrey Gala, creating and maintaining all the PowerPoint slides and graphics for our TV screen in the lobby at Surrey House, and designing and producing invitations for activities here at Surrey.

When something new comes up, Jane embraces it enthusiastically. She learned how to use a Wii, and is now the instructor for the weekly Wii program offered here.



She has one at home now, and plays it with neighbors and her eight-year-old nephews.

"The staff here is fantastic," says Jane, "they have always given me patient, one-on-one training, and opportunities to do things I would never have done otherwise. Surrey is an amazing place. There is never a dull moment!"

Surrey recently asked Jane to test a home monitoring system that we are evaluating to help our homebound seniors stay in contact with the outside world. "I am excited to be the guinea pig."

"It is important to belong to Surrey," says Jane, "because they believe in living independently. I was invited to lunch here once, and have been here ever since. And I will be, as long as I can!"

NEIGHBOR HELPING NEIGHBOR

*In total, more than **500** members and other community members volunteered nearly **36,000** hours.*

SURREY MEMBERS

*Of those we serve nearly **75%** are women;
almost **25%** are over 85 years old;
just over **50%** are alone, and over **33%** live
on \$20,000 or less each year.*



In the fall of 2009, Surrey received the Best of The Main Line Award for Best Senior Services.

Building a Technology Base that Takes Surrey into the Future

In February, 2010, Surrey received a \$24,000 grant from the OMG Center for Collaborative Learning, part of a Pew fund for capacity building. This funds Phase 1 of a process that will result in a new data management system at Surrey. The present data collection and management system does not effectively evaluate the impact of our programs on the individual members.

With membership increasing 175% over the past 10 years, and a budget that increased 273% over that same time period, Surrey's services and systems have been challenged in many ways.

In order to continue to grow and improve our programs to meet the ever-increasing elderly population, we are moving from a program-centered system to a person-centered system. We currently track and evaluate our program areas individually, maintaining five different databases. We need to better manage our data in order to evaluate how we are serving each *individual member*. This 360 degree view of each member and how they use our services will illustrate

outcomes of services provided. Providing funders with information about social issues and the impact of their support is a key element of a partnership. Effective data collection raises awareness of both need and impact.

Working with NPower, a non-profit specializing in providing technical expertise to other non-profits, all our departments underwent procedural and work-flow analyses. As a result, NPower recommended several vendors for long-term data management software systems. The new system will include a web-based interface to improve remote access. With the proper security levels in place, board members, staff, volunteers, and members will be able to use the same system.

Conducting an online member survey was identified as the first step in the data collection process. This was scheduled for the fall of 2010. Future challenges include securing the funding to implement this new system, and as a key part of Phase 2, training staff and volunteers on the new system.

Surrey was founded on the idea of neighbor helping neighbor

We would like to thank our many corporate and professional "neighbors" who have generously donated their skills, time and services to Surrey over the past year:

Joseph M. Cahill, Ltd.

Girard Partners

Nolan Painting, Inc.

Lois Quinn, RN

Valley Press

Woodcock Washburn

We would also like to recognize our corporate and school volunteer partners. These organizations have enriched Surrey in so many ways, from entertaining us to helping maintain our buildings and so much more.

Arkema

Art Reach

Belmont Baptist Church

Betsy Daily School of Dance

Conestoga High School Key Club

Conestoga High School Hockey Team

Conestoga High School

Camerata Choir

**First Presbyterian Church
(West Chester)**

Gardener's Garden Club

Goodwill

Hillside Elementary School Choir

Junior Service Board

Marple Christian Church

Messiah Lutheran Church

The Notables

Overbrook School for the Blind

Plymouth Whitmarsh High School

**Prudential Fox & Roach Realtors,
Wayne & Devon**

MOMS Club of Radnor Township

Savoy Opera Company

The Vanguard Group

Wayne Elementary School

Wayne Woods Garden Club

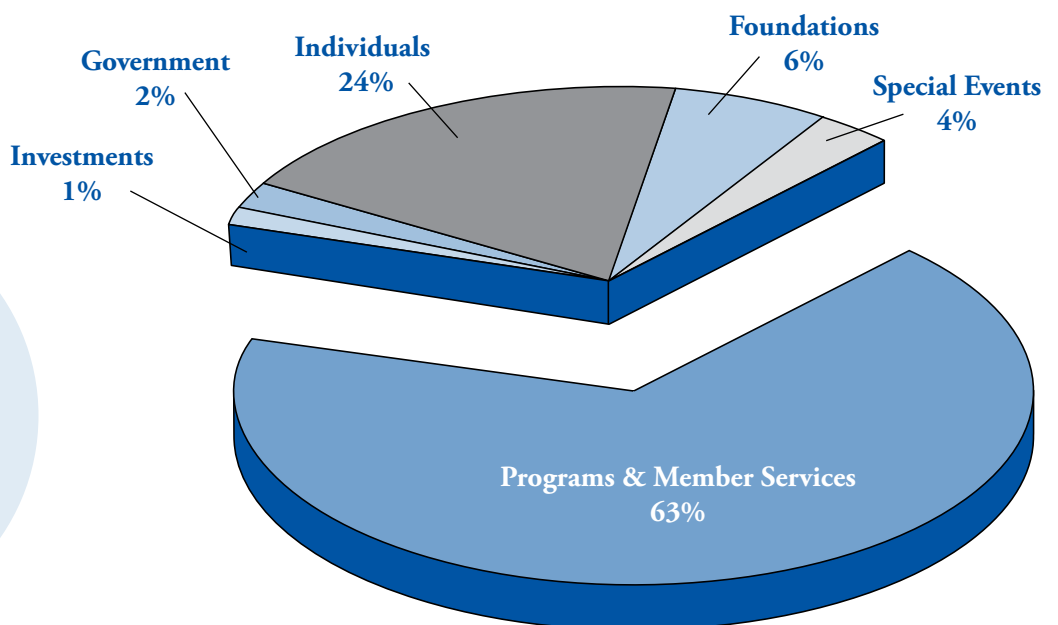
Financial Overview

Statement of Financial Position — June 30, 2010 and June 30, 2009

ASSETS	2010	2009
CURRENT ASSETS:		
Cash and cash equivalent	\$108,203	\$71,203
Accounts receivable	161,220	140,545
Current portion — Unconditional promises to give	175,962	169,870
Prepaid expenses	57,318	26,099
Total Current Assets	502,703	407,717
PROPERTY AND EQUIPMENT:		
Property, Plant & Equipment	1,934,935	1,922,823
Less: Accumulated depreciation	(886,241)	(786,776)
Net Property and Equipment	1,048,694	1,136,047
OTHER ASSETS:		
Long term unconditional promises to give	109,179	246,326
Security deposits	1,400	1,400
Long term investments	172,173	152,727
Total Other Assets	282,752	400,453
TOTAL ASSETS	1,834,149	1,944,217

LIABILITIES AND NET ASSETS	2010	2009
CURRENT LIABILITIES:		
Line of credit	\$ —	\$95,000
Accounts payable	63,412	24,511
Accrued expenses	139,703	114,577
Deferred revenue	54,047	29,961
Total Current Liabilities	257,162	264,049
NET ASSETS:		
Unrestricted	1,248,635	1,256,028
Temporarily restricted	323,430	419,218
Permanently restricted	4,922	4,922
Total Net Assets	1,576,987	1,680,168
TOTAL LIABILITIES AND NET ASSETS	\$1,834,149	\$1,944,217

Surrey Services Operating Funds FY10



*In March 2010,
the theme of the
Surrey Spring Gala was
a community block party.
The event netted
\$64,000.*

Thank You!

Thank you! To the following donors who have supported Surrey Services for Seniors from July 1, 2009 – June 30, 2010, please accept our thanks:

INSTITUTIONAL SUPPORT

Leadership Circle (\$25,000+)

ENDO Pharmaceuticals
The Hamilton Family Foundation
The Pew Charitable Trust
Radnor Township
The Scholler Foundation
The Wright-Cook Foundation

Benefactor (\$10,000+)

Anonymous
Commonwealth of Pennsylvania
Helen D. Groome Beatty Trust
The McLean Contributionship
OMG Center for Collaborative Learning
1675 Foundation
Vanguard Charitable Endowment Program

Patron (\$5,000+)

AmerisourceBergen Services Corporation
Aqua Charitable Trust
Land Rover/Jaguar Main Line
Pembroke North Condominium
The St. Sue Foundation
Ethel Sergeant Clark Smith Memorial Fund
The May and Stanley Smith Trust

President's Club (\$2,500+)

Chesterbrook Partners of Pitcairn Properties
Eden Charitable Foundation
The Kistler Tiffany Foundation
Liberty Property Trust
Main Line Health System Medical Staff
Dr. Donald J. Rosato Charitable Foundation
Sovereign Bank
Walker-Pratt Family Fund —
The New York Community Trust

Founder's Society (\$1,000+)

Acme Markets
The Barra Foundation
Borough of Malvern
Chatham Foundation
Chester County Community Foundation
Fox Chase Bank
Fox and Roach Charities
Girard Partners, Ltd.
The LiquidHub Charitable Fund
MW Industries, Inc.
The Rorer Foundation
St. David's Episcopal Church
Wachovia – Wells Fargo Foundation
Wayne Presbyterian Church
The H.O. West Foundation

Neighbors' Circle (\$500+)

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Broomall Rotary Foundation
Gen. Smedley D. Butler Detachment
Continental Bank
The Delaware County Medical Society
ExxonMobil Foundation Inc.

Holt Family Foundation
Italian-American Club of Wayne
Krapf's Coaches, Inc.
Millennium Wealth Management
Dale E. Nelson Co., Inc.
Overbrook Golf Club Ladies Bridge
Penn Liberty Bank
PNC Bank
Sloane Toyota of Devon
St. Francis-in-the-Fields Episcopal Church

INDIVIDUAL SUPPORT

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Mr. and Mrs. Parker Blatchford
Estate of Alice H. Fernandez
Mrs. J. Maxwell Moran
Ms. Betsy Schumacker
Estate of Dorothy Therman

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