

RECEIVED

COMMUNITY BENEFITS REPORTING FORM

Pursuant to RSA 7:32-c-1

MAR 31 2014

FOR FISCAL YEAR BEGINNING 01/01/2014 CHARITABLE TRUSTS UNIT

to be filed with:

Office of the Attorney General
Charitable Trusts Unit
33 Capitol Street, Concord, NH 03301-6397
603-271-3591

Section 1: ORGANIZATIONAL INFORMATION

Organization Name Mark Wentworth Home

Street Address 346 Pleasant Street

City Portsmouth **County** 08 - Rockingham **State** NH **Zip Code** 03801

Federal ID # 02-0222243 **State Registration #** 2947

Website Address: www.markwentworth.org

Is the organization's community benefit plan on the organization's website? No

Has the organization filed its Community Benefits Plan Initial Filing Information form? Yes

IF NO, please complete and attach the Initial Filing Information Form.

IF YES, has any of the initial filing information changed since the date of submission?

Yes **IF YES**, please attach the updated information.

Chief Executive: William Henson 6034360169
whenson@markwentworth.org

Board Chair: Ray Ambrogio 6034360169 rrealm1@comcast.net

Community Benefits

Plan Contact: Gretchen Poehlman 6034360169
gpoehlman@markwentworth.org

Is this report being filed on behalf of more than one health care charitable trust? No

IF YES, please complete a copy of this page for each individual organization included in this filing.

Section 2: MISSION & COMMUNITY SERVED

Mission Statement: Our vision is that Mark Wentworth Home is an active participant in a community dedicated to ensuring our seniors are fully engaged in living better lives longer.

Mark Wentworth Home's mission is to provide the seniors we serve with the support necessary to maintain their individual strengths and capacities; that they, along with their families and friends, have trust in our desire and ability to help them succeed; and that all members of our staff fully embrace the belief that they are greatly respected and appreciated for playing an important part in this effort.

Has the Mission Statement been reaffirmed in the past year (*RSA 7:32e-1*)? Yes

Please describe the community served by the health care charitable trust. "Community" may be defined as a geographic service area and/or a population segment.

Service Area (Identify Towns or Region describing the trust's primary service area):

Greater Portsmouth NH area and surrounding Seacoast towns including New Castle, Hampton, Greenland, Rye, Stratham, Exeter, Newington, Newmarket, Durham, Dover and Southern Maine Seacoast towns including Kittery, Eliot, and York.

Service Population (Describe demographic or other characteristics if the trust primarily serves a population other than the general population):

The Mark Wentworth Home is a supported residential care community which provides professional healthcare support to seniors who benefit from oversight and assistance with their activities of daily living and/or require physical or medical support due to chronic conditions related to aging. Presently the average age of the Home's residents is 89 years.

Additionally, the Mark Wentworth Home collaborates with the City of Portsmouth to provide transportation services to senior and disabled residents who are unable to access public transportation from their homes due to medical or financial restraints. The Mark Wentworth Senior Transportation Program serves seniors age 62+ who reside in Portsmouth.

As a trusted provider of senior living services the Mark Wentworth Home also serves Seacoast area adult children and spousal caregivers with a support group and educational resources for self-help. Caregiver support resources are typically provided to persons between the ages of 55 and 70 and often extends beyond the NH and Maine Seacoast.

Section 3: COMMUNITY NEEDS ASSESSMENT

In what year was the last community needs assessment conducted to assist in determining the activities to be included in the community benefit plan?

2012 (Please attach a copy of the needs assessment if completed in the past year)

Was the assessment conducted in conjunction with other health care charitable trusts in your community? Yes

Based on the needs assessment and community engagement process, what are the priority needs and health concerns of your community?

	NEED (Please enter code # from attached list of community needs)
1	603
2	372
3	601
4	611
5	125
6	999
7	
8	
9	

What other important health care needs or community characteristics were considered in the development of the current community benefits plan (e.g. essential needs or services not specifically identified in the community needs assessment)?

	NEED (Please enter code # from attached list of community needs)
A	501
B	430
C	123
D	602
E	
F	
G	

Please provide additional description or comments on community needs including description of “other” needs (code 999) if applicable. *Attach additional pages if necessary:*

999 As indicated by the 2012 community needs assessment and on-going community discussions in Portsmouth, the Mark Wentworth Home has been an active participant in evaluation and planning for a sustainable senior center.

Please refer to the attached narrative for categories in Section 4: Community Benefit Activities.

Section 4: COMMUNITY BENEFIT ACTIVITIES

Identify the categories of Community Benefit activities provided in the preceding year and planned for the upcoming year (note: some categories may be blank). For each area where your organization has activities, report the past and/or projected unreimbursed costs for *all* community benefit activities in that category. For each category, also indicate the *primary* community needs that are addressed by these activities by referring to the applicable number or letter from the lists on the previous page (i.e. the listed needs may relate to only a subset of the total reported costs in some categories).

<i>A. Community Health Services</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Community Health Education</i>	1 B D	\$21,300.00	\$21,300.00
<i>Community-based Clinical Services</i>	-- -- --		
<i>Health Care Support Services</i>	-- -- --		
<i>Other:</i>	-- -- --		

<i>B. Health Professions Education</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Provision of Clinical Settings for Undergraduate Training</i>	-- -- --		
<i>Intern/Residency Education</i>	-- -- --		
<i>Scholarships/Funding for Health Professions Ed.</i>	2 A --	\$16,353.00	\$16,767.00
<i>Other:</i>	-- -- --		

<i>C. Subsidized Health Services</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Type of Service: Senior Transportation</i>	3 1 --	\$61,160.00	\$80,000.00
<i>Type of Service: Adult Day Program</i>	4 2 --	\$165,800.00	\$0.00
<i>Type of Service: Senior Wellness Center</i>	6 A 1	\$0.00	\$32,400.00
<i>Type of Service:</i>	-- -- --		
<i>Type of Service:</i>	-- -- --		

<i>D. Research</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Clinical Research</i>	-- -- --		
<i>Community Health Research</i>	-- -- --		
<i>Other:</i>	-- -- --		

<i>E. Financial Contributions</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Cash Donations</i>	D -- --	\$930.00	\$1,000.00
<i>Grants</i>	-- -- --		
<i>In-Kind Assistance</i>	D B A	\$750.00	\$450.00
<i>Resource Development Assistance</i>	-- -- --	\$7,930.00	

<i>F. Community Building Activities</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Physical Infrastructure Improvement</i>	-- -- --		
<i>Economic Development</i>	-- -- --		
<i>Support Systems Enhancement</i>	-- -- --		
<i>Environmental Improvements</i>	-- -- --	\$2,500.00	\$2,500.00
<i>Leadership Development; Training for Community Members</i>	-- -- --		
<i>Coalition Building</i>	-- -- --		
<i>Community Health Advocacy</i>	1 A 5	\$25,300.00	\$25,300.00

<i>G. Community Benefit Operations</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Dedicated Staff Costs</i>	3 -- --	\$40,000.00	\$40,000.00
<i>Community Needs/Asset Assessment</i>	-- -- --		
<i>Other Operations</i>	A 1 --	\$1,500.00	\$600.00

<i>H. Charity Care</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Free & Discounted Health Care Services</i>	5 -- --	\$79,200.00	\$79,200.00

<i>I. Government-Sponsored Health Care</i>	<i>Community Need Addressed</i>	<i>Unreimbursed Costs (preceding year)</i>	<i>Unreimbursed Costs (projected)</i>
<i>Medicare Costs exceeding reimbursement</i>	-- -- --		
<i>Medicaid Costs exceeding reimbursement</i>	-- -- --		
<i>Other Publicly-funded health care costs exceeding reimbursement</i>	5 -- --	\$80,793.00	\$33,400.00

Section 5: SUMMARY FINANCIAL MEASURES

<i>Financial Information for Most Recent Fiscal Year</i>	<i>Dollar Amount</i>
<i>Gross Receipts from Operations</i>	\$5,597,638.00
<i>Net Revenue from Patient Services</i>	
<i>Total Operating Expenses</i>	\$6,632,550.00
<i>Net Medicare Revenue</i>	
<i>Medicare Costs</i>	
<i>Net Medicaid Revenue</i>	
<i>Medicaid Costs</i>	
<i>Unreimbursed Charity Care Expenses</i>	\$159,993.00
<i>Unreimbursed Expenses of Other Community Benefits</i>	\$375,970.00
<i>Total Unreimbursed Community Benefit Expenses</i>	\$535,963.00
<i>Leveraged Revenue for Community Benefit Activities</i>	\$211,069.00
<i>Total Community Benefits including Leveraged Revenue for Community Benefit Activities</i>	\$747,032.00

Section 6: COMMUNITY ENGAGEMENT in the Community Benefits Process

<i>List the Community Organizations, Local Government Officials and other Representatives of the Public consulted in the community benefits planning process. Indicate the role of each in the process.</i>	<i>Identification of Need</i>	<i>Prioritization of Need</i>	<i>Development of the Plan</i>	<i>Commented on Proposed Plan</i>
1) NH Dept of Health & Human Services BEAS	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2) City of Portsmouth Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3) Portsmouth Housing Authority	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4) Portsmouth City Council	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5) Families First Seacoast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6) Foundation for Seacoast Health	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7) Portsmouth Regional Hospital	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8) Friends of the South End Association	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9) Individuals residing on the NH Seacoast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
20)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
21)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please provide a description of the methods used to solicit community input on community needs (attach additional pages if necessary): In 2012 a Senior Services Committee, made up of representatives from the aboved named organizations and local seniors,organized a series of exploratory discussions with the local senior population to determine their needs and interests as they related to a permanent senior center, and activities and services typically found within such a center. A detailed survey of Portsmouth seniors was conducted by mail. Results of the survey are included in the committee's report, along with feedback from local Boards and City Council. Meetings. The discussion provided information for the Home's 2012 Community Benefits Report.

Information regarding communities needs in 2013 has been collected from ongoing disussions related to the senior service identified as a need in 2012 and from input from the Home's primary demographic by way of telephone converations and in-person meetings.

Section 7: CHARITY CARE COMPLIANCE

Please characterize the charity care policies and procedures of your organization according to the following:	YES	NO	Not Applicable
The valuation of charity does not include any bad debt, receivables or revenue	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written charity care policy available to the public	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any individual can apply for charity care	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Any applicant will receive a prompt decision on eligibility and amount of charity care offered	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notices of policy in lobbies	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notice of policy in waiting rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notice of policy in other public areas	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Notice given to recipients who are served in their home	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Section 4: Community Benefit Activities Narrative

A. Community Health Education

The Mark Wentworth Home provides community health education services through a variety of educational sessions which are free and open to the public. Sessions cover topics such as Caregiver Support Resources, Approaching Senior Life-Style Changes, Financial Considerations related to Continuing Care and Assisted Living, and education on symptoms of dementia and Alzheimer's and coping strategies for topics related to aging.

In addition to the expertise offered through person-to-person education, the Home also makes available to residents and their families online healthcare education tools through the SilverChair Learning System—which includes many of the same training tools and resources available to our employees—free of charge.

The Home has an outreach initiative in place to provide guidance and education on senior health services to the Seacoast's healthcare providers; including Primary Care Physicians, Care Managers and Social Workers. Lunch and learn programs and informational material deliveries are sponsored by the Home throughout the year.

B. Funding Health Professions Education

The Mark Wentworth Home believes in supporting the educational growth of its employees to better serve Seacoast Seniors. The Home's Employee Development Program provides financial support for current MWH employees in good standing who wish to further their education in the area of healthcare or social services in order to better serve the seniors in our community. Additionally, the Home promotes professional development and career building through participation in industry conferences and seminars.

C. Subsidized Health Services

The Mark Wentworth Home provides a subsidy to two programs in Portsmouth which are in high demand, but are not fiscally sustainable on their own. Mark Wentworth Senior Transportation Program is a senior transportation service run from the Home, in collaboration with the City of Portsmouth. Transportation is provided for medical appointments, senior activities, senior meals, grocery or pharmacy shopping and for serving in volunteer positions anywhere within the city of Portsmouth. The Home subsidizes the cost of a full-time dispatcher and four drivers, four days a week.

To meet the needs of Portsmouth area seniors with cognitive impairment who are living in their home or that of a loved one but require daily supervision, the Mark Wentworth Adult Day Care Program provides a safe and engaging alternative to long-term care placement, three days per week. The Home subsidizes the cost of four employees who provide supervision, activities and personal care assistance.

In 2014 the Home will transition the use of the Adult Day Care Program space to that

of an interim Senior Center (The Mark Wentworth Senior Wellness Center). The Home will subsidize the cost of facility rental in the Adult Day Program's current location for the City of Portsmouth's Senior Services staff to hold Senior Activities and Health Clinics.

E. Financial Contributions

The Mark Wentworth Home believes in supporting other non-profit community organizations who share key elements of the Home's mission. Cash donations for sponsorship of local activities were given to the following organizations in 2013.

- Rotary Clubs
- Strawberry Banke Museum
- Alzheimer's Association's Walk to End Alzheimer's
- Portsmouth Garden Club's Youth Scholarship Fund
- Local theatre and youth music organizations

In addition to cash donations, the Home's employees contribute their time to the efforts of local organizations to raise funds in support of their causes. Two such organizations are the Rotary Club and the Alzheimer's Association.

The Mark Wentworth Home is at the center of one of the City of Portsmouth's historic neighborhoods, making it an ideal location for local organizations to meet. The Home provides space and hospitality to local organizations and associations throughout the year.

Additionally, the Home has been a frequent contributor of durable medical equipment to local Lions clubs and other fraternal organizations whose mission includes a provision for helping those in need of assistance.

F. Community-Building Activities

The Mark Wentworth Home participates in waste reduction initiative through a food and waste composting program.

Mark Wentworth Home employees participate in local, state and regional organizations related to senior living and wellness; and collaborate with local healthcare organizations to evaluate processes and trends affecting local healthcare initiatives. These include:

- Foundation for Seacoast Health
- Families First Health & Support Center
- Adult Day Services of NH
- Seacoast Human Resources Association
- New Hampshire Healthcare Association
- LeadingAge Maine /NH
- Alzheimer's Foundation of America
- Alzheimer's Association

- NHCQF Portsmouth Transitions Group
- City of Portsmouth Senior Services

G. Community Benefit Operations

The Mark Wentworth Home employs a full-time staff member to oversee the dispatching and management of the Mark Wentworth Senior Transportation Program for the City of Portsmouth.

Additionally, facilitation of grant-writing for various funds to support the Mark Wentworth Transportation Program and the Mark Wentworth Adult Day program is conducted by the Home's Controller.

In 2014 the Home will collaborate with the City of Portsmouth to operate an interim Senior Center at the Foundation for Seacoast Health's Community Campus. The interim Center will be operated from the Home's "Mark Wentworth Senior Wellness Center" at the Campus. Costs associated with the operation of the center's physical space are sponsored by the Mark Wentworth Home for the next two years.

H. Charity Care

The Mark Wentworth Home has made a commitment to residents who are no longer able to pay the full amount for the cost of services at the Home, through no fault of their own. This program is referred to as the Companion Program and is available to residents who are eligible after spending down their own assets, but who will not qualify for Medicaid/Choices for Independence benefits because of the aid program's income restriction. Typically the Home subsidizes the difference in the cost of care and the amount of the residents' income and/or available VA benefits.

In 2013 the Home subsidized the care for four residents who were eligible to participate in our Companion Program.

I. Government-Sponsored Health Care

The Mark Wentworth Home subsidizes the cost of care for residents of the Home who have qualified to receive aid from the NH Medicaid/Choices for Independence program as a result of a spend-down of their personal assets. In 2013 the Home subsidized the cost of care for two residents receiving the NH CFI benefit.