

Social Accountability at McLean September 20, 2016

INTRODUCTION

This study represents a comprehensive inventory of programs offered through McLean Health Care (Section I) and benefits of the McLean Game Refuge (Section II) that are subsidized either in full, or part, by McLean. Section III briefly explains the methodology and the calculations used to quantify the community charitable benefits and available to the public as part of McLean's charitable responsibilities.

SECTION I: McLEAN HEALTH CARE

Senior care, by itself, has long been recognized as a charitable activity by the Internal Revenue Service. In a landmark 1972 ruling, the IRS observed that the elderly are likely to experience forms of distress even if they are not poor, and that organizations that serve their special needs (housing, health care, and financial security) provide relief to the distressed even if they do not operate substantially below cost. This report focuses on the social benefits provided by McLean Health Care in addition to or extension of its mission of providing for the housing and care of its residents.

At least 37 programs or events provided by McLean Health Care benefit the community and provide important charitable benefits. The programs range in scope from the daily service of McLean Meals on Wheels to annual events such as employee sponsored toy drives. Many of the programs have been part of the McLean for decades while others are in response to changing needs in the community. All of the programs use the McLean Health Center, Wellness Center, or Burkholder Community center on the McLean campus for at least part of their activities. Even when a program is scheduled at an outside location, the planning, preparation and office needs are conducted at McLean. The programs are segmented into the following areas:

- community outreach events
- health care programs
- low income assistance programs
- rehabilitation programs, therapeutic recreation and wellness.

More than 2,400 local individuals in the community benefit annually through these programs either through partial or full subsidy.

LIST OF HEALTH CARE PROGRAMS

Community Outreach Services

There are 16 distinct community benefit programs provided by McLean ranging from year-round activities, to one day or single series events. The events are all conducted by McLean employees. *Personnel costs for these events totaled 2,978 hours, with nearly half (1,495 hours) at the supervisor or manager level.*

The events are free to the public and the general public is invited through social media, flyers or advertisements instead of directed mailing lists. The community outreach events reach between 1,000 and 1,300 individuals a year in the Farmington Valley.

McLean absorbs the full cost of conducting the events. Supplies, materials, and requested mailings totaled \$5,900 in 2015. Additionally, two of the events, the Bereavement Support Group and the Hospice Quilt use McLean facilities to host the events. The other events utilize the offices at McLean for preparation or contacting the individuals they are reaching out to assist.

Community Outreach Services provided year-round to the community include:

- Concierge-level referral support: When potential patients or residents are not accepted into McLean, the McLean staff goes above and beyond a basic state mandate to assist individuals/families in navigating the health care system. This translates into hundreds of hours of support each year. The Regulations of the State of Connecticut Department of Social Services state that referrals to other sources of assistance is required. However, there is no set amount of time required to provide this assistance. The McLean Director of Admissions, Kelly Koretz, states *“I personally feel like this stage of life is scary, and there are a lot of “unknowns” thrown at you in a time of crisis. Being able to be there, answer questions, and alleviate any burden is actually the best part of the job. It’s not mandated, it’s just the right thing to do.”* She refers to a motto she keeps on her desk to read daily, *“Our job is to connect to people, to interact with them in a way that leaves them better than we found them, more able to get where they would like to go.”*
- Palliative Care consultants: Palliative care supports patients and families along the continuum of a serious illness, as well as at the end of life. McLean Home Care & Hospice offers a complimentary Palliative Care Consultation provided by an experienced palliative care professional to seriously ill individuals, their families, physicians and other healthcare professionals, regardless of whether they are affiliated with McLean.
- Bereavement Support Group (bimonthly): The McLean Bereavement program helps support and normalize the process of grief for one-full year after the death of a loved one. The facilitated support group is part of the services provided and is open to the community at no charge. This program is a mandated program for the families of the patients McLean has served. For those family members who attend, McLean receives minimal payment under the hospice benefit. The benefit does not cover the cost of even the basic program and the McLean program goes beyond the mandated guidelines. There is no reimbursement for this program for members of the public who attend or those who attend after the Bereavement benefit has ended.
- Rehabilitation training and education: There are public lectures provided free at senior centers and libraries in the area which cover relevant rehabilitation topics such as fall prevention, joint health and other aging concerns.
- Nursing Students: McLean hosts students from area colleges in groups of 8 students at a time throughout their semester. There are 4 to 6 groups of nursing students a year. The Clinical Educator oversees the students providing them with an initial orientation,

in-services, and feedback through the semester. The nursing students' instructor accompanies the students and provides the day to day instruction; however, the McLean staff helps to educate the students as they have their clinical experience at McLean. There is no reimbursement for this mentoring.

Services provided at regular intervals to the community include:

- Hospice and Home Care outreach/education programs (2 - 3 times per year)
- Health Screening for physical therapy or balance (once a year)
- Lectures on chronic conditions by nursing staff to the general public. Recent topics have included heart health and COPD (2 times a year)
- Caregiver Series: This series of five sessions has been very popular and heavily attended. Managers from different departments and also outside lecturers such as representatives from the Alzheimer's Association provide caregivers with the information they need to keep their loved ones and themselves healthy and receiving the best care possible. (5 sessions in a series – 2 times a year)
- The Hartford Hospital Speaker's Series (new program with 4 lectures in 2016)
- McLean Speakers Series at the Simsbury Library on the aging process (4 sessions once or twice a year)
- Community non-profit engagement and support including the Alzheimer's Walk (approximately 6 times a year)

"My husband and I attended several of the workshops with my mother, whom we care for full time in our home. We found them to be extremely helpful. The guest speakers were very knowledgeable and offered great insight into topics we previously knew little about. Their explanations were very thorough and they took the time to answer any questions we had. And, of course, McLean put out a great food spread! Thank you, McLean!" Lisa Gray

Events provided on an annual basis include:

- Lights of Hope: An annual gathering held during the December holidays to provide a community of support and comfort, honoring loved ones lost with readings of encouragement, inspirational music and thoughtful reflection.
- Hospice Memorial Quilt of Remembrance: The hospice staff and hospice volunteers invite next-of-kin family members to provide a quilt square in memory of their loved one. A quilt is created with the squares and the families and entire community are invited to the annual quilt unveiling providing another avenue to reflect and remember. The quilt is then hung on the wall for an entire year.
- McLean regularly donates used equipment to Chariots of Hope that provides used wheelchairs and equipment to individuals in need.
- Eagle Scout project supervision for projects proposed by scouts but taking place on McLean Health Center property.

HEALTH CARE PROGRAMS

Activities conducted by McLean that directly impact the health of community residents and are provided free of charge include:

- McLean Hospice Volunteer Program: A total of 540 client visits were provide to community members in 2015. A basic volunteer program is mandated but totally unreimbursed by the government. The recruitment, training, ongoing education and supervision of the McLean Hospice Volunteers *is supported by 1,900 hours of paid McLean personnel and nearly \$1,000 for supplies each year.*
- The Memory Care Volunteer Program: This volunteer program was developed at McLean and it is one first or possibly the first program of this kind in the country (according to the Alzheimer’s Association of CT.) It provides respite for the family and meaningful engagement for the Memory Care client. This program, in its fourth year, currently serves 12 towns with 17 volunteers with a client population of up to 25. Original funding for this program was secured through a grant from the Hartford Foundation for Public Giving.
This program is managed by a part-time coordinator (1,248 hours per year) with minimal supplies.

Memory Care Volunteer, Alison Scherer: “I love being with my partners – that’s what I call my volunteer clients – because to me that’s exactly what we are - partners together in quality of life. I love our spontaneous connections and shared smiles – with or without words. Sometimes it’s as simple and immediate as the meeting of our eyes.”

- McLean Home Care TeleHealth: A digital technology providing home monitoring services (Telehealth) to proactively help patients reach their optimum levels of wellness and minimize medical crises. This service is not covered through Medicare or the patient’s insurance; however, in order to closely monitor individuals with cardiac and respiratory diagnoses, this is essential technology for patient care. Telehealth monitors vital signs and sends daily measurements like blood pressure, weight, and pulse oximeter to McLean nurses along with patients’ reports of changes or symptoms such as in edema and shortness of breath. It provides accurate data to prevent re-hospitalization and also provides a teaching tool for patients and caregivers to self-monitor their symptoms. The primary beneficiaries are elderly Medicare patients with heart failure, COPD, recent myocardial infarction, or serious palliative issues. When the patient’s Medicare episode ends, between 30 to 60 days, the equipment is removed. By then, patients have the education, equipment and knowledge to monitor their symptoms McLean provides this without reimbursement. This service is key to keeping patients at home instead of costly re-admittance to the hospital.
The equipment costs per year are \$16,548. If units are damaged or lost the cost increases. Monitoring and set up personnel costs are \$52,080 per year because monitoring is done seven days a week. Last year, 60 individuals benefited from this service with an increase of up to 100 expected in this current year.
The 1992 McLean Annual Report stated that McLean “had developed the first home care agency licensed in the State connected with a nursing home.”
- Hospice Family Overnight Room: McLean has a dedicated room which was developed from a bequest. This room provides a room for family members when a hospice patient is actively dying. This room is infrequently used with less than 35 days stay per year.

In total, the health care programs impact 240 individuals and families a year at a cost to McLean of 4,209 hours of personnel costs and \$19,348 for supplies.

LOW-INCOME ASSISTANCE

- Subsidized Medical Care: Each Medicaid client is subsidized at a cost of \$60 per day. In 2015 there were 63 residents of McLean with Medicaid reimbursement for a total of 18,641 days (most were year-long residents). *The cost to McLean was \$1,107,660.*
- Patient Personal Needs: One of the most rewarding programs at McLean is the Patient's Personal Needs Fund for inpatient residents on Medicaid. It provides hearing aids, glasses, dental care and lymphedema sleeves for those who have no way to obtain those items. *Approximately \$5,000 a year is provided for this program.*
- McLean Cottages: On the McLean campus there are 27 cottages for independent living. Seven of the cottages are available to low-income individuals who receive a substantially reduced monthly rent of \$400 a month versus the regular rent of \$1,800 a month. *This is an annual expense to McLean of \$117,600.*
- McLean Meal on Wheels: This program continues to support the health of our community since the early 1980s and serves the five town area of East Granby, Avon, Canton, Granby and Simsbury. The meals are prepared fresh each weekday morning in McLean's independent living kitchen. Each meal delivery consists of a complete hot meal, a cold meal, drinks and dessert items.

Not only are the meals that are provided prepared freshly each day but they also are prepared in accordance with specialized diets. For example those needing a low sodium diet, that is provided, or for those who do not like fish their meals are adjusted accordingly.

In 2015, 13,885 meals were delivered to 151 residents. The charge per meal delivery is \$9.50; however, the cost of each meal including labor and packaging is \$19.00 per delivery (one lunch and one dinner). Less than half of the meal recipients paid the \$9.50 rate last year. Grants and donation help to subsidize this program but McLean bears the vast majority of the cost. In 2015, subsidized rate meals cost \$61,043.50 while donations and grants only came to \$17,000. The cost to McLean was \$44,043 for the meal price reduction plus \$96,446 in personnel costs, cost of packaging and \$35,000 for the cost of using the kitchen and facilities for preparation of the meals.

Sophia Thorson, McLean Meals on Wheels Coordinator states, "It's the dedicated volunteer drivers and the community outreach. Keeping people safe and providing regular contact. It's an incredible feeling to know that together we make an enormous difference in people's lives."

- Simsbury Senior Center: McLean provides a hot midday meal for 50 seniors at the Simsbury Senior Center. The reimbursement rate by the seniors is \$3.60 and the balance is absorbed by McLean. *The unreimbursed cost to McLean for this program is approximately \$40,000 per year.*

REHABILITATION PROGRAMS

- The McLean Rehabilitation Department: Giving back to the community is a priority of this department. Potential physical therapy and occupational therapy students are invited to observe licensed therapists prior to entering their programs. The observation

period is 16 weeks and the Rehabilitation Department hosts eight incoming students a year.

There is no reimbursement for this observation training but the McLean therapists spend 276 hours per year on this program and the accompanying documentation time.

- **Physical Therapy Mentoring:** Once physical therapy students are accepted into a program, they are required to work with a licensed therapist. McLean therapists work with five students per year for 10 to 12 weeks per student.
The investment in this program is 1,000 therapist hours per year and 60 hours of documentation and coordination with the schools.
- **Outpatient Rehabilitation Department Volunteers:** McLean also employs volunteers in the outpatient therapies department. These volunteers are indispensable to the program and clients because they provide assistance so that the scheduler and therapists can give their full attention to the clients. *The coordination of the volunteers also impacts the personnel costs to the department.*

THERAPEUTIC RECREATION PROGRAMS

Therapeutic recreation is defined as providing activities and assistance to improve quality of life. McLean provides therapeutic recreation to all residents of the health center and also to the outside community. Services include the following:

- **Adult Day Services:** This service is provided year-round in the Robinson, McLean's assisted living neighborhood. Activities are provided both for some residents as well as day center attendees who live outside of McLean health center in the community. The program provides essential respite for the caregivers. Currently, there are ten community members who attend regularly, either daily or several times a week with an average of three days a week. A full-time staff person is dedicated to the community members attending, however, several other staff members are needed for programs, transportation to and from programs, and for care.
The fee charged per day for the adult day center does not cover the cost of the staff, food, activities and materials. Approximately two thirds of the cost is covered by the daily fee, while one third is subsidized by McLean.
- **Director of Therapeutic Recreation Community Consults:** Approximately 80 hours a year are spent visiting schools and community organizations to explain intergenerational programs at McLean and volunteer opportunities. These programs provide activities that enhance the lives of both the residents and the volunteers and school children.
- **Volunteer Opportunities:** There are many ways to volunteer at McLean and all require initial training, ongoing education, evaluations and documentation. Volunteer opportunities include working in the following programs: bingo and special activities, gift shop, health center, hospice, memory care, meals on wheels, pet therapy and reminiscing. Also, McLean welcomes high school students as volunteers.
The administrative work involved with volunteers (excluding the Hospice and Memory Care Volunteer programs) requires between 15 to 30 staff hours a week.

- Clergy Visits: McLean offers regular clergy visits to residents and the coordination of funeral services with families. Many Medicaid residents are unable to attend services outside of McLean due to a restricted income. The Therapeutic Recreation department ensures residents have regular opportunities to attend services at McLean and are offered clergy visits in their rooms.

Although this requires only a few hours a week or a few hours per service, the Therapeutic Recreation department spends 300 hours a year on the coordination of these important services.

WELLNESS PROGRAMS

- McLean Warm Water Pool: McLean's pool offers regular programs and classes available to the public and also used by a local group home with special needs individuals. The group home provides its own instructors. More than 95% of pool users are from the community at large. McLean residents of the health center very rarely use the pool and there is minimal use by the McLean Village residents.

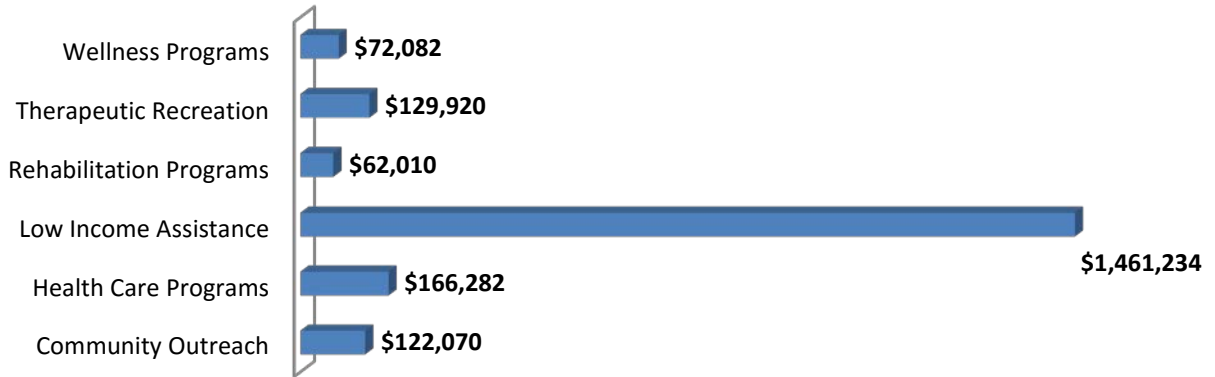
The cost of the maintenance staff and pool instructors comes to \$62,000 per year. Prorated basic pool maintenance and upkeep is approximately \$27,000 per year.

- Silver Sneakers: This recreational program is provided to the community twice a week, year round. The program is held in the Hartford Room of the Burkholder Community Center with a regular class size of 20 individuals. Approximately half of the individuals are residents of the McLean independent living community. The Silver Sneakers charge per person is \$8 per class; however, AARP members only pay \$3 per class. Therefore, the payment does not begin to cover the cost of the class and the facility cost.
- *Fees paid to McLean for Wellness programs came to \$36,200 in 2015.*

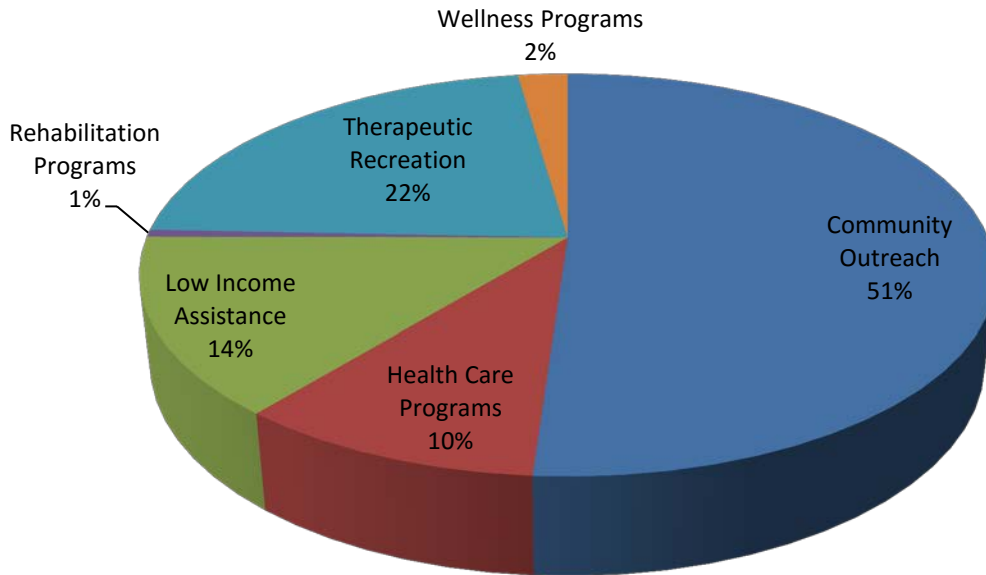
McLEAN HEALTH CENTER SUMMARY

The McLean Health Center activities served more than **2,443 individuals** during 2015 in Simsbury and the surrounding towns. The recipients of the programs and activities are served by **18,780 hours** of McLean personnel which translates to a cost for personnel and benefits of **\$650,105**. The building usage for all the health center programs totals \$54,200 and other expenses add another \$1,437,373. After excluding payments for those programs, **McLean supported the programs through its income, in the amount of \$2,013,598 in 2015.**

Total McLean Contribution by Program



Number of Individuals Served by McLean Charitable Programs



SECTION II: THE McLEAN GAME REFUGE

The McLean Game Refuge promotes the understanding and appreciation of nature and supports the conservation, preservation and management of natural resources.

OVERVIEW

The McLean Game Refuge provides broad protection, enhancement and quality of life to its neighboring communities and the thousands of outdoor enthusiasts who visit it annually.

Created through the will of Senator McLean with 3,200 acres, it has now grown through land acquisition to a 4,400 acre sanctuary open to the public free of charge. The property spans the towns of Granby, Simsbury and Canton. 1,800 acres of the game refuge is designated as a National Natural Area by the Department of the Interiors National Park Service. Open 365 days a year, it offers two major parking areas and a host of smaller entrances – often at capacity on weekends with a conservative estimate of 20,000 people visiting annually.

Protected open space is widely regarded as one of the most effective resources available to towns to manage growth, protect natural resources and scenery, sustain community character, and enhance quality of life. While open space preservation is a top priority in Connecticut, a recent study released by the Council on Environmental Quality “included a repeat warning that Connecticut is falling behind on its goals for saving the state’s remaining forests and other open space.” (Hartford Courant, April 16, 2016) In part due to the McLean Game Refuge, the towns of Granby, Simsbury and Canton have exceeded the state average.

In addition to the recreational and land preservation benefits provided to the community, the McLean Game Refuge also provides economic, ecosystem, water and public health advantages.

Economic Benefits

While the recreational and preservation benefits of open space are readily apparent, the many economic benefits are not. For example, a common misconception is that open space protection creates a loss of revenues for towns. While residential, commercial or industrial land usage may increase gross revenue, it will also increase the demand for services.

Open space protection reduces both the cost for public infrastructure and programs and the need for property tax increases. Therefore, open space preservation provides a balance and compliment to economic development.

Ecosystem Benefits

An ecosystem is a complex set of relationships among the living resources, habitats, and residents of an area. Ecosystems provide essential benefits like food, water, air and natural resources. Unfortunately, the value of these benefits is often ignored until the town or area faces a natural resource crisis or severe challenge. For example, an upstream wetland may filter pollution from water used downstream for drinking, or replenish an aquifer that supplies drinking water or prevent downstream flooding - reducing the cost to provide clean water to residents and commercial businesses.

Water Management

Open space benefits include water management and drainage, including storm water runoff, preservation of surface water quality and stream flows, and the infiltration of surface water to replenish aquifers. When lands are converted from open space to other uses, the natural benefits provided by open space often must be replaced through the construction of water treatment facilities to clean up contaminated surface or groundwater supplies, levies to control flooding or other infrastructure to control storm water. Local taxes often pay for the construction of facilities to replace these lost drainage benefits.

According to the U.S. Government Accountability Office, on land with natural groundcover, only 10 percent of precipitation becomes runoff, while 90 percent infiltrates into the ground. However, when 75 percent of the site is covered with impervious surfaces, 55 percent of the precipitation becomes runoff. Thus, on paved parking lots, 98 percent of precipitation becomes runoff. Paving not only significantly increases the amount of storm water that runs off from a parcel of land, but it also increases the speed of runoff. In comparison to open space, streets and parking lots create conditions that prevent groundwater from being recharged.

Increases in the percentage of land covered with impervious surfaces result in greater amounts of storm water that must be managed, which can translate into higher municipal costs. Moreover, storm water managed by engineered systems is more likely to pollute subsurface water than water filtered through forested open space.

The natural drainage and water management provided by open space can significantly reduce municipal costs for water treatment. A 2002 survey of 27 water suppliers found that for every 10 percent increase in forest cover in a municipal water system's watershed, costs of water treatment decreased by 20 percent.

Public Health

Environmental psychologists have demonstrated that contact with nature restores attention and promotes recovery from mental fatigue. They attribute these beneficial qualities to the sense of fascination found in the experience of the outdoors. Increasingly evidence suggests that time spent in nature and outdoors is an appropriate public health strategy. Overall, contact with nature is an important component of a healthy, wholesome life. For these reasons, in the same way that protecting water and protecting air are strategies for promoting public health, protecting natural landscapes can be experienced as a powerful form of preventive medicine.

McLEAN GAME REFUGE SUMMARY

*The McLean Game Refuge is maintained by one manager and two summer employees. There is a barn for equipment which also serves as an office. **The cost of personnel and maintenance expenses for the game refuge is slightly more than \$228,000 per year.** Note that this does not include capital improvements that have taken place over the years. Nor does it include the ecological benefits enumerated above or the enjoyment to the 20,000 people who visit each year and the individuals who live in the surrounding towns.*

SECTION III: METHODOLOGY & CALCULATIONS

Program Type	# served	Personnel cost	Expenses other than personnel	Building usage costs	Offsetting Grant or Payments	Total McLean Contribution
Community Outreach	1,248	\$114,170	\$5,900	\$2,000	0	\$122,070
Health Care Programs	240	\$145,334	\$19,348	\$1,600	0	\$166,282
Low Income Assistance	346	\$97,791	\$1,357,303	\$35,000	\$28,860	\$1,461,234
Rehabilitation Programs	14	\$62,010	0	0	0	\$62,010
Therapeutic Recreation	540	\$159,840	\$27,920	\$5,200	\$63,040	\$129,920
Wellness Programs	55	\$70,980	\$26,902	\$10,400	\$36,200	\$72,082
TOTAL McLEAN HEALTH CENTER	2,443	\$650,125	\$1,437,373	\$54,200	\$128,100	\$2,013,598
McLean Game Refuge	20,000					\$228,000
TOTAL McLEAN AFFILIATES	22,443					\$2,241,598

Programs

The programs were described and listed by senior management and supervisors through extensive interviews.

Personnel Costs

The number of hours spent by personnel on the projects was conservatively estimated then compared to the remaining hours the personnel had to spend on their other duties and projects. The number of hours spent by employees was reviewed by the Vice President of Human Resources.

The Vice President of Human Resources calculated the cost of the personnel by position and by department and included the cost of the associated benefits.

Building Costs

The cost of a non-profit renting a room for a meeting was considered when estimating the cost of using the McLean facility. The cost of \$100 a week for the activity room was estimated for the adult day center attendees who do not reside at McLean. The use of the Hartford Room for the Silver Sneakers program was estimated at \$50 an hour. The use of the Cole Conference Room was estimated at \$25 per hour.

The use of the Burkholder kitchen was determined by estimating the number of meals prepared there. Half of all meals prepared in that kitchen are for the Meals on Wheels program. Given that the kitchen has many large expensive pieces of equipment, the use of the kitchen for Meals on Wheels was conservatively estimated to be \$35,000 per year.

Expenditures & Reimbursement

The expenditures and reimbursement amounts were taken from the department budgets, the grants received and the worksheets from the Finance Office.

Community Members Impacted

Most programs have registration lists or sign in sheets. The number of individuals was garnered from those forms. Those that do not have registration a best guess was used based on the size of the facility or room and the number of information packets used.

The number of visitors to the McLean Game Refuge was a more difficult number to arrive at. Weekdays there are an average of 40 cars a day at the main entrance on Route 10/202, more in the summer, less in the winter, but always visitors. On weekends there are 39 parking spaces on 10/202 that are full almost all day year round. There are also a substantial number at the Barn Door Hills entrance. The calculations were assuming only one person per car which is not the case with most visitors. There are also many scout troops, families, school groups and cross country teams that use the game refuge. Very conservatively, the game refuge has in excess of 20,000 visitors a year.