

2009: A Time to Rebalance

CHAIRMAN'S MESSAGE

The commitment of the Board of Trustees to carry out the mission of The Ohio Masonic Home in 2009 was unwavering. We continue to feel being members of the Board is one of the highest honors of our Masonic lives. Our trustees, management teams and employees are committed each and every day to seeing that seniors are cared for in a dignified and supportive manner.

The most comforting feeling that comes with being part of such a great organization is to know that collectively nearly 750 individuals called the Springfield Masonic Community, Browning Masonic Community and the Western Reserve Masonic Community home in 2009. In addition, our community-based services – I-CARE, Masonic Helping Hands and Cornerstone Home Health & Hospice – provided thousands of services to people in their homes.

As a nation, 2009 was the year we began to climb out of the recession. Some of those effects still linger. Whether your business is construction, financial services, manufacturing, retail or even the Home's business, healthcare, 2009 was a challenging year. But changes in our economy are not new for The Ohio Masonic Home. Having been in business for nearly 120 years we have faced many obstacles and have overcome their challenges. Thus, like in the past we take the time to rebalance.

Rebalance is a term used by investors to make sure their investment portfolios are distributed according to their plan. Employers often rebalance staffing ratios to make sure they are meeting the needs of their customers. And individuals must rebalance their lives to address changes they face, whether with their health, finances, home or family.

The theme of this year's report is "A Time to Rebalance." As you read our annual report, I encourage you to note the breadth and depth of the services we provide to older adults in a retirement setting and in a community-based services setting.

On behalf of our Board of Trustees, our management teams and our employees, thank you for the opportunity to bring to life the mission of The Ohio Masonic Home as we "provide quality adult healthcare, retirement living and community-based services in a dignified, supportive living environment in the name of Ohio Freemasonry."

Dale G. Ray, Jr.

Chairman of the Board of Trustees



Dale G. Ray, Jr.



CEO MESSAGE

One of the most important responsibilities The Ohio Masonic Home faces is to stay current in the services we provide to our residents and community-based clients. To remain up to date you look at existing operations and explore new trends. In doing so, it's often necessary to rebalance the organization.

The Home has changed extensively since its beginnings in the 1890s with one campus in Springfield, Ohio. In 2009, nearly 750 residents lived in one of our three Masonic communities located in Springfield, Waterville and Medina, while thousands of service hours were rendered to clients throughout the state from our community-based programs of I-CARE, Masonic Helping Hands and Cornerstone Home Health and Hospice.

Each of our executives has a role in rebalancing. Chief Operating Officer Mike Williams speaks of the streamlining of campus operations and researching best practice opportunities for Alzheimer's and dementia-related care; while John White, Interim Chief Financial Officer, addresses the changes in refinancing our debt, which will aid us as we begin to see our investments rebound from the previous year. Tim Strawn, president of the Benevolent Endowment Foundation, describes the efforts of his board to rebalance the investment portfolio.

This year of change also calls for us to look at how and where services were rendered. More seniors are staying in their homes and we are responding by developing services to meet the demands of an aging population. During 2009, Cornerstone Home Health and Hospice provided over 13,000 visits to more than 200 clients. As for Masonic Helping Hands, nearly 39,000 hours of service were rendered to 206 clients. And our I-CARE program continues to link senior Masons, their wives and widows to social service needs throughout the state.

As we look back on 2009 as a year of rebalancing, I would like to thank all of our employees for the care and compassion they provide to our residents and community-based clients. In addition our thanks to the Board of Trustees whose vision is that The Ohio Masonic Home focus its resources to provide innovative eldercare and charitable relief in the best possible environment.

Marion L. Leeman

Managing Chief Executive Officer



Marion Leeman



J. Michael Williams

COO MESSAGE

Throughout 2009, The Ohio Masonic Home campuses focused on projects to rebalance our operations. The objective was to build and grow on the solid foundation that has been developed over 100 years.

We have streamlined our campus operations in Springfield, Waterville and Medina to reflect a more cost appropriate structure. Long-term care funding and reimbursement is ever changing. It is the focus of the campus presidents to see that the care and services we provide to our residents is done in both a quality conscious and cost-effective manner.

One project was to rebalance the Springfield Masonic Community to accommodate 144 skilled nursing facility beds. This included relocating the physical therapy unit and making adjustments in the transitional care unit. Much of this was accomplished with little or no disruption to our residents.

An early retirement option was offered to qualifying Springfield employees, allowing several other tenured employees to be promoted from within the organization and keeping continuity. In making these changes, our Springfield campus is positioned to be competitive within the region as we look to the future.

Another area we addressed was the need to add Alzheimer's and dementia-related care to Browning Masonic Community and Western Reserve Masonic Community. Alzheimer's care is not just about the "bricks and mortar." It is also about the services and programs the resident receives. In the case of Browning and Western Reserve, their teams worked extensively in researching the best practice opportunities available. Their research led them to a program called Rhythm of the Day[®]. We are excited about rolling this program out in the near future and add a new tool to aid those who suffer with this debilitating disease.

Though these were not the only projects addressed in 2009, they represent a broad array of topics that we tackled in order to rebalance The Ohio Masonic Home.

Our campuses also received state and federal recognition. Browning Masonic Community was ranked 8th in the state out of 547 assisted living facilities for quality of services. And Western Reserve Masonic Community and Springfield Masonic Community received the highest federal overall 5-Star ranking for their nursing homes.

The future is bright and we look forward to the new decade as we continue the traditions we've upheld since 1892.

J. Michael Williams

Chief Operating Officer