



6.1 PROPOSAL PACKAGE COVER LETTER

<p><b>HOME OFFICE ADDRESS:</b></p> <p><u>SENIOR Solutions</u> Company</p> <p><u>Douglas A Wright</u> Contact</p> <p><u>3420 Clemson Blvd Unit 17 Anderson, SC 29621</u> Mailing Address</p> <p><u>864-225-3370</u> Phone</p> <p><u>dwright@seniorsolutions-sc.org</u> E-mail address</p>	<p><b>NOTICE ADDRESS:</b></p> <p><u>SENIOR Solutions</u> Company</p> <p><u>Douglas A Wright</u> Contact</p> <p><u>3420 Clemson Blvd Unit 17 Anderson, SC 29621</u> Mailing Address</p> <p><u>864-225-3370</u> Phone</p> <p><u>dwright@seniorsolutions-sc.org</u> E-mail address</p>
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<p><b>PAYMENT ADDRESS:</b></p> <p><u>SENIOR Solutions</u> Company</p> <p><u>Douglas A Wright</u> Contact</p> <p><u>3420 Clemson Blvd Unit 17 Anderson, SC 29621</u> Mailing Address</p> <p><u>864-225-3370</u> Phone</p> <p><u>dwright@seniorsolutions-sc.org</u> E-mail address</p>	<p><b>OFFEROR'S TYPE OF ENTITY: (CHECK ONE)</b></p> <p><input type="checkbox"/> Sole Proprietorship</p> <p><input type="checkbox"/> Corporate Entity (not-tax exempt)</p> <p><input type="checkbox"/> Partnership</p> <p><input type="checkbox"/> Corporation (tax-exempt)</p> <p><input type="checkbox"/> Government entity (Federal, State, local)</p> <p><input checked="" type="checkbox"/> 501(c)3</p>
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**6.2 CERTIFICATION**

The term "Offer" means your "bid" or "proposal". Your Offer must be submitted in a sealed package. Solicitation number and opening date must appear on the package exterior.

In response to your Request for Proposal (RFP) #: APAAA/ADRC 2015-1, - Spartanburg County CoA the following proposal is submitted.

Service(s):

Home Delivered Meals, Group dining, Group Dining Transportation,  
Level 1 Home Care Minor Home Repair and  
Evidence Base Health Promotion

The term of any Contract(s) resulting from this RFP shall be for the period beginning April 4, 2016, and continuing through June 30, 2017. All budgetary and unit cost information should be based on the time period referenced above.

**CERTIFICATION:** I certify that the information contained in this proposal, fairly represents this entity and its operating plans and budget necessary to conduct the proposed provision of In-Home and Community Based Services for the Elderly under Title III of the Older Americans Act and South Carolina State-Funded Programs of the State Unit on Aging described herein. I acknowledge that I have read and understand the requirements of the Request for Proposal (RFP) and that this entity is prepared to implement the proposed services as described herein. I further certify that I am authorized to sign this proposal and any contractual agreement emanating there from on behalf of the entity submitting the proposal. This PROPOSAL is firm for a period of at least ninety (90) calendar days from the closing date form submission, which is January 6, 2016

01/06/2016

\_\_\_\_\_  
Signature of Signatory Official (in Blue Ink)

\_\_\_\_\_  
Date

Douglas A Wright

\_\_\_\_\_  
President/CEO

\_\_\_\_\_  
Typed Name of Signatory Officials

\_\_\_\_\_  
Typed Job Title of Signatory Official

57-0634502

\_\_\_\_\_  
Taxpayer Identification Number



6.3 CONTRACT TERMS & CONDITIONS

In order to be considered for an award of a contract for any of the services being procured through this RFP, your concurrence, agreement and signed acceptance of the STANDARD TERMS AND CONDITIONS (found in Attachment A) is a general requirement. These requirements will become part of any contract(s) resulting from this RFP. The AAA is aware that, in rare circumstances, an exception may apply. If you take exception or are unable to comply with a particular standard, you must identify the standard and provide an explanation. The AAA will consider your comments, however it should be noted that allowable waivers are rare.

My signature below certifies that, with the exception, if applicable, of the requirement(s) specifically identified below, I have read, understand, and agree to comply with and be bound by each of the Standard Contract Terms and Conditions found in Attachment A of this RFP. I understand that these are standard AAA requirements that will become part of any contract(s) awarded pursuant to this RFP and that failure, at any time, to certify and/or maintain compliance may result in termination of any contract. I understand that additional service-specific requirements regarding the provision of services must also be met. I further certify that I am authorized to sign this proposal and any contractual agreement resulting there from on behalf of the entity submitting the proposal.

*D. Wright*

01/06/2016

Signature of Signatory Official (in BLUE ink)

Date

Douglas A Wright

President/CEO

Typed Name of Signatory Official

Type Job Title of Signatory Official

SENIOR Solutions

57-0634502

Organization/Company Name

Taxpayer Identification Number



6.4 NON-COLLUSION

In order to be considered for an award of a contract for any of the services being procured through this RFP, your concurrence, agreement and signed acceptance of the following NON-COLLUSION certification is required.

As an authorized representative of SENIOR Solutions,  
{fill in offeror organization's name}  
hereafter referred to as "we" or "our," my signature below certifies:

- 1. That we have submitted the enclosed offer and that we are fully informed regarding the preparation and contents of the offer and of the requirements for providing the services being procured through this RFP;
- 2. That none of our officers, partners, owners, agents, representatives, employees or parties in interest, including the undersigned, has in any way colluded, conspired, connived or agreed, directly or indirectly, with any other offeror, firm or person to submit a collusive or sham offer or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage in connection with any contract that may be awarded to any offeror responding to this solicitation;
- 3. That none of our officers, partners, owners, agents, representatives, employees or parties in interest, including the undersigned, has sought through any collusion, conspiracy, connivance or unlawful agreement to have any other party refrain from making an offer of their choosing or to limit any such offer to specific geographic locations or scope of services;
- 4. That the offer submitted herewith is not tainted by a collusion, conspiracy, connivance or unlawful agreement on the part of any of our officers, partners, owners, agents, representatives, employees or parties in interest, including the undersigned.

01/06/2016

Signature of Signatory Official (in BLUE ink)

Date

Douglas A Wright

President/CEO

Typed Name of Signatory Official

Typed Job Title of Signatory Official

SENIOR Solutions

RFP#APAAA/ADRC 2015-1

Organization/Company Name

RFP #



6.5 PROPOSED SERVICES AND PRICE

Name of Agency

SENIOR Solutions

Identify the service(s) and the applicable counties that you are offering to provide by placing "YES" in the appropriate cell(s).

Service	Anderson County	Cherokee County	Greenville County	Oconee County	Pickens County	Spartanburg County
Home Delivered Meals	x	x	x	x	x	Yes
Group Dining	x	x	x	x	x	Yes
Group Dining Transportation	x	x	x	x	x	Yes
Level 1 Home Care Minor Home Repair	x	x	x	x	x	Yes
Evidence Based Health Promotion	x	x	x	x	x	Yes

Identify the offer price(s) and the applicable counties that you are offering to provide by placing the "price" in the appropriate cell(s). Figures must match the budget worksheet.

Service	Anderson County	Cherokee County	Greenville County	Oconee County	Pickens County	Spartanburg County
Home Delivered Meals	x	x	x	x	x	6.11
Group Dining	x	x	x	x	x	6.27
Group Dining Transportation	x	x	x	x	x	1.89
Level 1 Home Care Minor Home Repair	x	x	x	x	x	1.10
Evidence Based Health Promotion	x	x	x	x	x	5.77



## 6.6 ORGANIZATIONAL SUMMARY

**Summarize how your organization's history, capability and philosophies make you the best contractor for the services you are proposing to provide.**

SENIOR Solutions has been serving seniors in the Upstate of South Carolina for over 48 years. Our Mission is to promote the mental, physical and spiritual well-being of the senior community with a Vision Statement of "a commitment to caring service". This mission and vision have been met through the exceptional service delivery to over 12,000 seniors in the Upstate of South Carolina by providing Home Delivered Meals, Home Care, Transportation, Adult Day Care, Senior Centers, Group Dining, Assisted Living, Information and Referral, Insurance Services, and Care Management.

SENIOR Solution's philosophy is to serve as a one stop shop for seniors where they can turn to one source and receive the help that they need. Finding a provider that seniors can trust is very comforting to seniors and they dislike having to go out and find another provider because the first one doesn't provide all of the services they need. Seniors want familiarity, in transportation to their doctor, home care aides, home delivered meals, and they feel safe when they are delivered by a trusted name like SENIOR Solutions. SENIOR Solutions can offer multiple services, all under one name, this creates a sense of trust and a higher degree of comfort for seniors than a group of multi named organizations that have banded together to service Spartanburg County.

It is also important to note that SENIOR Solutions has been providing management oversight of senior services in Spartanburg County since May 2015 and direct service delivery for all Group Dining, Wellness and Home Delivered Meals since August 2015 when Senior Centers of Spartanburg could no longer provide the service.

In terms of capacity SENIOR Solutions surpasses the competition with over 225 employees, 54 transportation vans, 8 Frozen Meal vans. We have senior operations and facilities in 4 Upstate Counties, we provide transportation in Anderson, Oconee, Pickens, and Spartanburg. We provide Home Care, Adult Day Care, Group Dining, Senior Centers, and Insurance Services, in Anderson, Oconee and Spartanburg and we provide home delivered frozen meals in Anderson, Oconee, Pickens, Spartanburg, Laurens, Abbeville, Greenwood, McCormick and Edgefield. New innovations in service delivery like Dine-In®, our home delivered choice frozen meal program, is the largest such program in the State of South Carolina serving over 11,000 meals per week. Dine-In® allows us to serve a better quality, low sodium, high protein meal, which costs more to make, but delivery costs are less because we deliver it once a week. Seniors love the taste, love the convenience of eating them at whatever time suits them, love the choices, they can choose between over 60 different choices. Our Insurance division serves 4,000 seniors annually and allows us to help seniors make the



correct choice for Medicare health issues based on their medical needs. All these service types are delivered with goals that include key focus areas of Customer Service, and Extraordinary Operations.

SENIOR Solutions commits to coordinating services with Community Long Term Care (CLTC), SCDHEC Diabetes, Heart Disease, Obesity & School Health Division, Mobile Meals of Spartanburg, Clemson University Extension Service SNAP, City of Spartanburg, VCOM, the Spartanburg Northwest Project, Spartanburg County Parks and Recreation, City of Inman and other senior service providers.

SENIOR Solutions has over 48 years' experience offering these quality programs and services using cutting edge ways to serve. These new programs, coupled with our traditional services ensure SENIOR Solutions can reach more seniors with less resources, and making it the best choice for the Area Agency on Aging to provide services for this Spartanburg RFP.

The Board of Directors gave approval for the President/CEO to respond to the Appalachian Council of Governments/Area Agency on Aging RFP on January 5, 2016.

## **6.7 ORGANIZATIONAL CAPACITY**

### **References**

1. Jimmy Lindsey  
South State Bank  
201 E. Greenville Street  
Anderson, SC 29621  
864-224-3777
2. Don Karns  
Step Change Solutions, LLC  
201 Forest Glen Drive  
Piedmont, SC 29673  
864-710-4183
3. Scott Webber  
Wells Fargo  
1101 N Main Street  
Anderson, SC 29621  
864-261-5070
4. Kandee Beckley  
Community Long Term Care



P.O. Box 5947  
Anderson, SC 29623  
(864) 224-9452

### **Accounting Firm**

McKinley, Cooper & Co., LLC  
Marcy Loucks  
555 Norton Pleasantburg Drive, Suite 225  
Greenville, SC 29607-2191  
864-233-1800

### **Organizational Chart**

Attachment 6.7.1

### **Board of Directors/Officers**

Attachment 6.7.3

### **Business Structure**

SENIOR Solutions has been in existence for over 48 years, serving the senior populations, originally in of both Anderson and Oconee Counties, and now all over the upstate. Originally organized as the Anderson County Senior Citizens' Action Council on Aging in 1968, it merged that same year with the Oconee Council on Aging to become the Anderson-Oconee County Council on Aging. Now, known as SENIOR Solutions the agency's focus continues to be serving seniors by promoting a healthy quality of life by providing multiple services including: home delivered meals, transportation, group dining, home care, adult day care, care management, insurance services, and senior centers. .

In 2015 SENIOR Solutions added another location in downtown Spartanburg, soon to become the major focal point for senior services in Spartanburg County, and a much needed senior center.

SENIOR Solutions is led by a volunteer Board of Directors made up of 12 business and community leaders with various areas of expertise. SENIOR Solutions also employs several key people who work together to provide the specialized services to our aging population. Each member of the management team offers a unique skill that is instrumental in making SENIOR Solutions one of the most personalized, and professional agencies in the state.

*Douglas A. Wright, President/CEO* of SENIOR Solutions is responsible for the day-to-day management of services offered through the agency. His experience in the non-profit arena spans more than 20 years. His scrupulous financial goals have





been accomplished by sound budget control, reorganization of the financial department, and the establishment of an asset inventory system. His expertise in interpreting financial data and monitoring cash flow projections has accounted for the expansion and success of SENIOR Solutions. In addition to his accomplishments in non-profit administration, he has held various leadership titles with Leadership Anderson, Leadership Oconee, SC Council on Aging Directors Association, Transportation Association of South Carolina, American National Red Cross, Anderson Area Chamber of Commerce, the Medicaid Transportation Oversight Committee, and city government. Mr. Wright makes it a priority to stay connected to the community.

*Teresa Martin, Executive Vice President*, has been with SENIOR Solutions for 8 years. Prior to her service with the agency, her relationship spans 10 years with a local accounting firm which processed payroll and audits for SENIOR Solutions. Ms. Martin has helped the agency to develop customized internal financial reporting to improve the organization in accounts receivable, accounts payable and cash flow management. In addition to her management skills in oversight for the agency's administrative and human resource department, she also provides service delivery oversight to three Adult Day Cares, Lakeview Assisted Living, two Senior Centers, Care Management, and Home Care.

**Dustin Cummings, Vice President of Transportation and Senior Nutrition** has been with SENIOR Solutions for 6 years. Prior to his service with the agency he served in the US Marine Corps in logistics. He provides service delivery oversight leadership to Transportation and Home Delivered Meals utilizing his logistics skills from the military to move seniors and manage inventory at superior levels. Thru Mr. Cummings leadership has made SENIOR Solutions the largest Transportation Provider of any Council on Aging in South Carolina.

**SENIOR Solutions** is a 501 c 3 nonprofit corporation, registered in South Carolina. It is affiliated with:

- Lakeview Assisted Living, Inc.
- Sloan Street Housing Corporation
- Sloan Street Housing Corporation II
- SENIOR Solutions Insurance Services, Inc.
- All wholly owned subsidiaries of SENIOR Solutions



## Organization's Experience

SENIOR Solutions has been serving seniors for over 48 years. Services are provided in Anderson, Oconee, Spartanburg, Greenville, Laurens, Pickens, Abbeville, and Edgefield Counties. Our Mission is to promote the mental, physical and spiritual well-being of the senior community. This mission has been served through the service delivery of Home Delivered Meals, Home Care, Transportation, Adult Day Care, Senior Centers, Congregate Dining, Service Management, an Assisted Living and Insurance Services.

SENIOR Solutions enjoys and maintains active relationships with Community Long Term Care, Department of Health and Human Services, Department of Social Services, Mobile Meals on Spartanburg, the City of Spartanburg, Logisticare, VCOM, and Clemson University. These relationships are important to our agency and to the seniors served by SENIOR Solutions. SENIOR Solutions commits to working with these and other senior providers. Our care managers will collaborate daily with organizations to locate appropriate services for seniors throughout Spartanburg County and the Upstate.

Because Transportation services are so important to all senior programs, and how it interacts with all services our Transportation Services are one of our greatest strength and very much speaks to the capacity to serve seniors in Spartanburg County.

For over 30 years SENIOR Solutions has provided Medicaid funded Medical transportation in Anderson, Oconee, Pickens, Spartanburg, and Greenville Counties. SENIOR Solutions has been a provider of transportation services for the Office on Aging since its inception in 1968. We have developed a scheduling and route management system called Ntransit which manages over 800 Medical, Day Care, and Group Dining trips per day and we have an experienced staff in our Transportation HUB that ensures that clients are picked up and dropped off on time. The Ntransit Software helps measure the Transportation Department daily for on time performance for A-Leg Pick up times, A-Leg Drop off times, and B-Leg Return Drop Off times.

Our Transportation Department also has all 54 vehicles and 55 Drivers in compliance with Logisticare's and SC DHHS rigorous compliance standards, 7 vehicles and over 10 drivers are housed solely in Spartanburg County.

Each of our vehicles is equipped with a GPS locator so the Transportation Hub knows where every vehicle is at all times during the day. If a client or caregiver calls in to find out when their ride will arrive we have the ability to see in real time when they will be arriving.

SENIOR Solutions also maintains human telephone support 24 hours per day 7 days per week. The Transportation Hub is open 6:00 AM to 6:00 PM M-F and an



afterhours phone is answered by a human, not a machine, from 6:00 PM to 6:00 am And 24 hours a day Saturday and Sunday. We have a direct line for Transportation clients to connect to the Hub without going through an operator.

### **AIM**

We currently use a Client Management System called Ntransit CMS. This system is a case management system which allows us to maintain all the appropriate documentation needed for AIM, as well as maintain information and data on non AAA funded clients. The program allows us to insert assessments, add clients to the waiting list, and insert units by funding sources and programs. The Ntransit CMS program exports data to AIM per the LGOA guidelines. Because of the Ntransit CMS program we only require 2 seats in AIM because all information is stored and handled in Ntransit CMS and exported monthly.

### **6.7.4 Grant Related Income/ Cost Share Funds**

Each Group Dining Site Supervisor is responsible for collecting all contributions for each day in which the site is open. Once all the money is collected for the week, the Site Supervisor will count it and complete a Contribution Report. The Site Supervisor will mail a Money Order and Contribution Report every week, on Friday, to the Finance Department at SENIOR Solutions. Upon arrival, the Executive Administrative Assistant will submit the Contribution Report to the Group Dining Site Manager for audit and approval. Once approved, the Money Order is posted and deposited, and the Contribution Report is filed.

#### **Letters of support**

Attachment 6.7.5

#### **Resumes' of key personnel**

Attachment 6.7.6

### **6.7.4 General Guidelines/Control Objectives for All Cost Share Funds General Financial Management Procedures**

All cash disbursed must be for valid business purposes with proper authorization by designated management as outlined in the Delegation of Authority Policy. All disbursements must be properly recorded by the finance department.

Responsibilities for financial transactions regarding the purchase, approval, disbursing, check signing, deposits of cash and other receipts, and recording, and



reconciliation of bank statements must be assigned to different employees. Effectively, utilize the concept of segregation of responsibilities.

All expenditures must be approved as outlined in the Delegation of Authority policy. Categories with authorized listings are normal operating expenses, capital expenditures, capital retirements, inventory levels, safety items, and special items-i.e. Professional services (attorney fees, temporary employee hires, auditing services, consulting fees, and other non-routine items), Board approved budgets will serve as a guideline, a bench mark, to measure and evaluate actual expenditures against these pre-approved goals. They will in no way serve as authorizations for expenditures.

Proper authorization must always be documented. All invoices and employee expense reports requiring a disbursement of funds must be approved as outlined in the Delegation of Authority policy. After approving the vendor's invoice with signature and date, the invoice must be sent to the Finance department for payment. For employee reimbursements, a standard expense report must be completed by the employee and approved by the appropriate authority as outlined in the Delegation of Authority listing. Receipts for expenses other than travel must be attached to the expense report. Expense reports should be completed, approved, and submitted to the Finance department within two weeks after incurring the necessary expenses.

Requisitions will be forwarded through the various levels for approvals using email. The last required approver will submit the requisition via email to the Finance Department. The Finance Department will print the approved requisition and keep on file. The Finance Department will issue a Purchase Order Number to the requisitioner who may contact the vendor and place the order. When the materials or services are received, appropriate documentation (signed receiver or signed signature attesting service received) must be routed to the Finance Department. Vendor's invoices will be paid by the Finance Department upon a match of Purchase Order, Material Receiver (signature for service) and invoice. President/CEO will approve the initial service contract of all reoccurring utility services. A designated employee or employees will review and approve the invoice to ensure that the services are appropriately received and priced. These employees need not be managers or supervisors. It is more important that they be specialists in the utility that is being approved. It is important to distinguish between approving or authorizing expenditures and verifying or ensuring that the service has been received and is correct.

The Finance Department is responsible for the timely recording and allocation of the expenses for accurate financial reporting. This is done using QuickBooks accounting software.



All disbursements are computer generated using pre-numbered checks which are locked in a fireproof file in the Finance Department. Access to these checks and the ability to print checks is limited to the Executive Vice-President. The Executive Vice-President does not have check-signing authorization and may approve expenditures according to the Delegation of Authority Policy only.

No manual checks are ever used. The Finance department is responsible for the defacing and control of voided checks.

The Executive Vice-President is responsible for selecting the invoices and expense reports that must be paid on a timely basis and properly managing cash flow.

#### CHECK SIGNING

All authorized check-signers are to compare check amounts with the supporting documentation as well as verify proper approval. Each invoice must be verified that the person who authorized the expenditure had the authority to do so according to the Delegation of Authority. The signer should initial the bottom portion of the check stub to document their review.

Only one signature is required. The practice of signing blank checks is prohibited.

Signed checks are returned to the Finance Department which is responsible for mailing the checks and filing. The bottom portion of the check stub is stapled to all paid items as proof of payment.

Those authorized to sign checks after the individual invoices have been properly authorized according to the Delegation of Authority and if all criteria has been met, are the following:

President/CEO and Vice-President of Transportation & Senior Nutrition

#### BANK RECONCILIATIONS

Bank statements are reconciled by the Executive Vice-president and reviewed by the President/CEO using cash disbursement records generated by the Finance Department.

The Executive Vice-President will determine whether an expenditure is a capital expense or normal operating expense and require the appropriate approval for same.

#### 6.8 FINANCIAL MANAGEMENT AND STRENGTH

Because the funding provided to SENIOR Solutions by the AAA is seed money, additional resources used to expand and enhance the programs offered will be



provided through Medicaid contracts, HMO contracts, private donations and grant funding, and other wholly owned subsidiaries such as Lakeview Assisted Living, SENIOR Solutions Insurance Services, Inc., and Sloan Street Housing, Inc.

With funds from these resources and funds from the AAA, community donations and other funding sources, SENIOR Solutions has the capability of expanding our service area out into the rural areas of Spartanburg County, which currently receive very little attention.

The agency has not filed bankruptcy within the last 7 years nor since the inception of the agency in 1968.

Additional contracts and funding will lower the unit costs because they will help offset fixed capital expenses and other indirect overhead costs thus reducing overall unit costs.

The sources of the 10% match for these Older American funds is in the form of cash originating from United Way, County government, in kind cash-equivalents from Municipal and County Governments, and general fund revenues of the Agency provided through Medicaid contracts, HMO contracts, private donations and grant funding, and other funds from wholly owned subsidiaries such as Lakeview Assisted Living, SENIOR Solutions Insurance Services, Inc., and Sloan Street Housing, Inc.

Our recent audit/Financial Statement shows additional financial strengths.

### **Audit Report**

Attachment 6.8.2

## **6.9 QUALITY MANAGEMENT**

### **➤ How will you take action to remedy problems or concerns of service delivery?**

In Transportation services

Each morning at 5:30 AM a Transportation Supervisor reviews cancelations and add-ons and adjusts driver's schedules and routes. If a driver is out sick a backup driver is called in to replace the sick driver. We have at least one backup driver on call every day, we even do hospital discharges in the middle of the night.

If a vehicle will not start or breaks down at any time during the day a standby vehicle takes it place. With over 50 vehicles in our fleet we have standby's in each county including Spartanburg. We also can pull vehicles from other counties to ensure trips are completed.

In Group Dining VP of Senior Operations is in touch with all site managers in Spartanburg as well as the AAA to ensure problems are dealt with in a reasonable fashion.



- **How will you utilize data and quality information to engage in continuous improvement efforts?**
- We currently use a Client Management System called Ntransit CMS. This system is a case management system which allows us to maintain all the appropriate documentation needed for AIM, as well as maintain information and data on non AAA funded clients. The program allows us to insert assessments, add clients to the waiting list, and insert units by funding sources and programs. The Ntransit CMS program exports data to AIM per the LGOA guidelines. This program allows us to see trends for problems and opportunities and to address them or use them to expand our services.

- **How will you identify and utilize areas of strengths and pinpoint opportunities for improvements?**

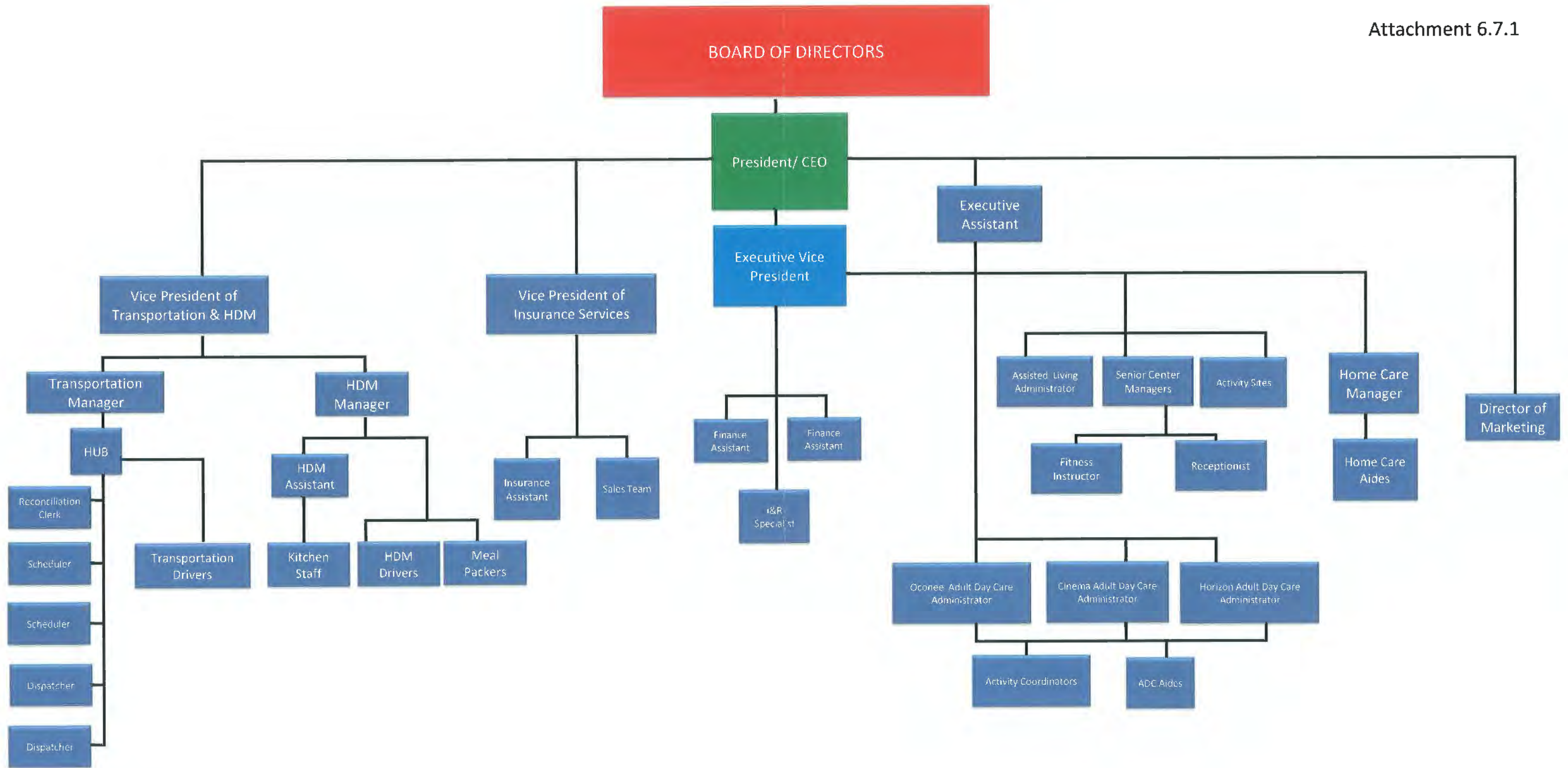
Improvement in customer satisfaction is the most important outcome measure for SENIOR Solutions. We use the Ntransit software program to track and measure customer satisfaction which will lead us to self-improvements in our service delivery programs.

**How will you assure quality of service meets the requirements of the Scope of Work as outlined in the RFP?**

SENIOR Solutions has established standard processes and measures to assure quality service delivery aligns with our AAA Contract and the Scope of Work requirements. Rigorous staff training, strict vehicle maintenance and safety compliance and above average on time performance makes SENIOR Solutions a preferred transportation provider with a reputation of outstanding commitment to caring service.

# SENIOR Solutions Organizational Chart

Attachment 6.7.1





ATTACHMENT 6.7.3



**Board Members 2015-2016**

**Sam McMillan, Chair**

**Phil Ashley**

**Greg Shore, 1<sup>st</sup> Vice Chair**

**Butch Hughes**

**Rachelle Propp Shirley, Secretary**

**Linda C. Elliott**

**Jeff Hawkins**

**Dr. Ronnie Booth**

**Lou Jack Orr**

**Leo Medina**

**Dr. Sophie Woorens-Johnson**

TRI-COUNTY TECHNICAL COLLEGE



Ronnie L. Booth, Ph.D.  
President

April 3, 2014

Douglas A. Wright  
President/CEO  
SENIOR Solutions

Dear Mr. Wright:

I would like to take this opportunity to support SENIOR Solutions in their bid to continue to deliver senior programs and services in the Upstate of South Carolina.

SENIOR Solutions has been performing senior programs and services since 1968. We feel that their staff provides quality service to the clients in the respective counties they currently serve, always placing the clients' needs first.

Thank you for this opportunity to show our support of SENIOR Solutions in this bid process. We endorse their application to continue to deliver senior programs and services in the Upstate of South Carolina.

Sincerely,

A handwritten signature in black ink, appearing to read "Ronnie Booth".

Ronnie L. Booth, Ph.D.  
President  
Tri-County Technical College



SERVING UPSTATE SOUTH CAROLINA SINCE 1978

P.O. BOX 6  
ANDERSON, SC 29422  
Anderson (864) 234-4444  
Greenville (864) 236-8888  
Laurens (864) 824-8911  
Columbia (803) 794-8191



April 3, 2014

Mr. Doug Wright  
President/CEO Senior Solutions  
3420 Clemson Boulevard  
Anderson, SC 29621


Dear Doug:

I would like to take this opportunity to support SENIOR Solutions in their bid to continue to deliver senior programs and services in the Upstate of South Carolina. We have worked hand in hand to ensure that their clients' needs are met

SENIOR Solutions has been performing senior programs and providing services since 1968. We feel that their staff provides quality services to the clients in the respective counties they currently serve, always placing the clients' needs first.

Thank you for this opportunity to show our support of SENIOR Solutions in this bid process. We endorse their application to continue to deliver quality senior programs and services in the Upstate of South Carolina.

Respectfully

  
Greg L. Shore  
CEO  
Medshore Ambulance Service



April 4, 2014

Mr. Douglas A. Wright  
President/CEO  
SENIOR Solutions  
101 Perry Avenue  
Seneca, SC 29678

Dear Mr. Wright:

I would like to take this opportunity to support SENIOR Solutions in their bid to continue to deliver senior programs and services in the Upstate of South Carolina.

SENIOR Solutions has been performing senior programs and services since 1968. We feel that their staff provides quality service to the clients in the respective counties they currently serve, always placing the clients' needs first.

Thank you for this opportunity to show our support of SENIOR Solutions in this bid process. We endorse their application to continue to deliver senior programs and services in the Upstate of South Carolina.

Sincerely,

A handwritten signature in black ink that reads "Jeanne L. Ward". The signature is written in a cursive style.

Jeanne L. Ward, RN, EdD  
President/CEO

## Doug Wright

---

**From:** Klopfenstein, Jeffrey R.  
**Sent:** Tuesday, December 29, 2015 10:56 AM  
**To:** dwright@seniorsolutions-sc.org  
**Cc:** Ingo (i.angermeier@aol.com)  
**Subject:** ACOG RFP from Senior Solutions

Doug,

I wanted to offer this letter of support for Senior Solutions with hopes it will help in your efforts to continue providing Congregate meal service, transportation and other programs vital to the seniors of Spartanburg County. I clearly support and recommend Senior Solutions be approved by the Appalachian Council of Governments (ACOG) during the RFP process to continue providing these services in Spartanburg County.

As a former board member of the Senior Centers of Spartanburg County, it was very important that we found a suitable partner to carry on service to our seniors after our organization was forced to discontinue service due to our financial difficulties. During our struggles, Senior Solutions came forward with a viable plan for continued service to our seniors. Much of this was patterned by the successful programs, organization and operations that had already been implemented by Senior Solutions in Anderson County. This included enhanced meal service, transportation services, facility management and other programs that would enrich the lives of our Spartanburg seniors. In other words, Senior Solutions did not need to "reinvent the wheel" but rather just drew from their success in Anderson County and applied it to our senior programs in Spartanburg County.

Clearly Senior Solutions is also on more solid financial ground than the Senior Centers of Spartanburg County at the time our board was considering options. They are well established financially and are likely to represent a more reliable, long-term service provider than other start-up organizations wishing to compete for these service contracts. During the short time that Senior Solutions has taken over services from Senior Centers of Spartanburg County, Senior Solutions has grown their frozen meals program, medical transportation, home evaluation, and insurance advice services at the new site in Spartanburg. Transportation has already outgrown their original ten drivers and three new vans, and they are hiring more drivers. They have raised to quantity and quality of services and are eager to do more. I also understand the mayor of Anderson, Terrence Roberts, speaks very highly of Senior Solutions.

Please accept this letter with best wishes for much success in serving our seniors in Spartanburg County.

JEFF KLOPFENSTEIN  
LOCAL SALES MANAGER

WSPA/WYCW  
250 International Drive  
Spartanburg, SC 29303  
T: 864.595.4616  
M: 864.316.1249

WSPA.com  
CarolinasCW.com

7 On Your Side  
CAROLINAS CW62 TV HOW

## Doug Wright

---

**From:** Ingo  
**Sent:** Tuesday, December 29, 2015 7:39 PM  
**To:** dwright@seniorsolutions-sc.org  
**Subject:** Letter of Support for Senior Solutions Spartanburg County ACOG RFP

Dear ACOG Review Committee,

I am writing this letter in support of the Senior Solutions proposal to deliver congregate Meals, transportation, and other AAA senior services in Spartanburg County.

I served as the last Board Chair for the Spartanburg County Senior Centers (SCSC). The Board had contracted with Senior Solutions to manage the Spartanburg County programs in May of 2015. Because of defunding, SCSC ceased operations on October 16th. Senior Solutions graciously continued providing services for over a month until the ACOG could write an interim, emergency agreement. Many of the past SCSC employees had been hired by Senior Solutions providing seniors with a sense of continuity and comfort. There was no break in services and the ACOG was made to look good.

Meanwhile, Senior Solutions purchased a 10,000 square foot building in downtown Spartanburg and has hired over two dozen new workers from Spartanburg to further serve Spartanburg residents. Reliable medical transportation has been described as a huge need in this market. Senior solutions has initiated and rapidly grown it's delivery service to this undeserved population. Senior Services has the largest transportation service in the state of South Carolina. Required reports confirm that this transportation system has a far better response time and higher client satisfaction. Sadly, the only available Spartanburg County Transportation Services has been plagued with a dismal on-time record always failing to meet program standards. Many Spartanburg community leaders have identified reliable, timely transportation as a major need for

Senior Services provides a wildly popular menued meals delivery service. While many folks receive meals-on-wheels from a Spartanburg provider, they lack delivered meal service for the week's other 16 meals. This service fills that void with nutritious, selected meals with fresh fruit and milk.

Spartanburg has been identified by the Lieutenant Governor's office as likely the poorest served by senior services. It is the largest county with no senior day care services. Senior Solutions intends to end that distinction by offering these services in Spartanburg. It currently operates three senior day care services in its other services areas.

In short, Seniors Services saved AAA services, grew other services, and promises to greatly increase its other programs in Spartanburg. With it's program history in western Upstate Counties and it's graciously continuing AAA required services when no other provider was capable or willing, it becomes impossible not to enthusiastically recommend that Senior Solutions continues to share its 40-year history of excellent senior programs with Spartanburg residents. They are indeed a class act.

Sincerely,

Dr. Ingo Angermeier  
Past Chair, Spartanburg County Senior Centers

**Douglas A. Wright**

3420 Clemson Blvd  
Anderson, SC 29621

**Resume of Qualifications**

(864)225-3370  
[dwright@seniorsolutions-sc.org](mailto:dwright@seniorsolutions-sc.org)

**Work Experience**

**1998- Present**

**President/CEO** of SENIOR Solutions is responsible for the day-to-day management of services offered through the agency. His experience in the non-profit arena spans more than 20 years. His scrupulous financial goals have been accomplished by sound budget control, reorganization of the financial department, and the establishment of an asset inventory system. His expertise in interpreting financial data and monitoring cash flow projections has accounted for the expansion and success of SENIOR Solutions. In addition to his accomplishments in non-profit agencies, he has held various leadership titles with Leadership Anderson, Leadership Oconee, SC Council on Aging Directors.

April 1998 to October 1998 Executive Director, Anderson-Oconee Head Start

Management of all day-to-day operations, during a Federal close out period, for a 2.5 million dollar non-profit agency, with 131 employees. Initiated a reorganization plan, rejuvenated the Board of Directors, and established collaborative opportunities with many community organizations.

June 1993 - April 1998 Executive Director, American Red Cross in Eastern Maine

Management of day-to-day operations and long term strategic planning that oversees a population of 110,000 and a service delivery area of five counties. A few highlights include: 800% revenue increase in fund raising in four years by establishing a strong development department; eliminating United Way dependency; merging two independent chapters, and spearheading all statewide financial development activities.

Douglas A. Wright  
Page 2

September 1992 - June 1993 Comptroller, Hope House, Inc.

Direct and prepare financial statements, budget development, cash management, grant proposals, and personnel administration, supervision of A/R, A/P, and patient billing. Act as liaison between management and Board of directors on financial matters.

October 1988 - August 1992 Chief Financial Officer, Getchell Bros., Inc.

Manage financial resources, investments, budgeting, financial statement preparation, monthly management summaries, collection, MIS function, supervision of telemarketing, and inventory.

## **Education**

Bachelor of Business Administration (1974)  
Major in Accounting  
Thomas College, Waterville, Maine

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## **Professional Affiliations and Achievements**

- Member, Board of Regents, Leadership Anderson, 2003/2004
- Member, Board of Directors, Leadership Anderson Alumni Association, 2001-2002
- President, South Carolina Council on Aging Directors Association, 2001
- Graduate, Leadership Anderson, Class XVII, 2000
- Co-Chair, National Red Cross Lead Financial Development Network, 1997-1998
- Chair, Red Cross Financial Development Committee for state of Maine, 1993-1998
- Member, Red Cross State Service Council, 1993-1998
- Presenter, National Red Cross Financial Development Conference 1996 and 1997
- Mayor, Town of Pittsfield, Maine, 1981-1982
- Town council member, Pittsfield, Maine, 1977-1982

## **References**

Furnished upon request



**Dustin Cummings**

615 Old Hundred Road Pelzer, SC

864-905-3762

**OVERVIEW**

Distinguished leadership and management experience in both planning and execution of operations and missions worldwide. I have established oneself as a hardworking, knowledgeable, reliable and determined leader. Always seeking out tasks of increased complexity and importance to facilitate mission accomplishment

**PROFESSIONAL EXPERIENCE****SENIOR Solutions**

2008 -- Present

**Vice President of Transportation and Home Delivered Meals**

- Administers agency' Home Delivered Meals and Transportation programs
- Directly supervises HDM and Transportation drivers and staff
- Study and analyze routes to ensure routes remain within timely delivery requirements and maximum efficiency
- Responsible for the preparation of all required agency HDM and Transportation reports
- Study and analyze work flows and identify ongoing process improvements

**UNITED STATES MARINE CORPS**

2004 - 2008

**Battalion Embarkation Chief****Battalion Embarkation Chief**

- Prepared embarkation load plans, and monitored the loading and offloading of personnel and equipment
- Cataloged and ensured completion of all requests that were submitted for transportation and support from senior management personnel
- Provided guidance, oversight, and training to units preparing for deployment.
- Developed, analyzed, and executed plans for movements of over 1,000 personnel and equipment

**Assistant Logistics Chief**

- Created and maintained numerous data bases to track movement of personnel and or equipment
- Experience in operations management ranging from simple movements while in the continental United States, or planning movements while forward deployed in support of "Operation Iraqi Freedom"
- Oversight of motor transportation, ordnance, and supply to ensure mission accomplishment

**Education**

Lecanto High School	Graduated with 3.0/4.0	2000 - 2004
Marine Corps Institute	Over 40 hours completed	2004 - 2008
Greenville Technical College		2009 - Present

Pursuing Associates in Business Management and Supply Chain Management

# Teresa Martin

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3420 Clemson Blvd. Anderson, SC 29621 tmartin@seniorsolutions-sc.org

## Experience

### **EXECUTIVE VICE-PRESIDENT | SENIOR SOLUTIONS | MAY 2008 TO PRESENT**

Responsible for maximizing an organization's operating performance and achieving its financial goals. Communicating with the board of directors to preparing operating budgets and financial statements. Sets goal, monitor work, and evaluate results to ensure that departmental and organizational objectives and operating requirements are met and are in line with the needs and mission of the organization. Assumes the responsibilities in the absence of the president/CEO.

### **STAFF ACCOUNTANT | GREENE & COMPANY | JANUARY 1999 TO MAY 2008**

Worked for public companies, private firms and governmental agencies in preparing tax returns and in internal auditing, Maintained computerized accounting records and prepare financial reports. Recording financial transactions (such as checks written and received); managing accounts payable and receivable; reconciling bank statements; updating the trial balance, profit-and-loss statement and balance sheet; managing payroll; invoicing clients; making federal and state tax deposits; and completing annual tax forms, such as W-2s and 1099 for different companies.

### **LOAN OFFICER/HEAD TELLER | SOUTHEAST FEDERAL CREDIT UNION | JULY 1999 TO JANUARY 1999**

**SUPERVISED AND COORDINATED ACTIVITIES OF WORKERS ENGAGED IN RECEIVING AND PAYING OUT MONEY AND KEEPING RECORDS OF TRANSACTIONS IN BANKS AND SIMILAR FINANCIAL INSTITUTIONS: ASSIGNS DUTIES AND WORK SCHEDULES TO WORKERS TO ENSURE EFFICIENT FUNCTIONING OF DEPARTMENT. TRAINED EMPLOYEES IN CUSTOMER SERVICE AND BANKING PROCEDURES. APPROVES CHECKS FOR PAYMENT**

**APPROVE LOANS WITHIN SPECIFIED LIMITS, AND REFER LOAN APPLICATIONS OUTSIDE THOSE LIMITS TO MANAGEMENT FOR APPROVAL. MEET WITH APPLICANTS TO OBTAIN INFORMATION FOR LOAN APPLICATIONS AND TO ANSWER QUESTIONS ABOUT THE PROCESS. ANALYZE APPLICANTS' FINANCIAL STATUS, CREDIT, AND PROPERTY EVALUATIONS TO DETERMINE FEASIBILITY OF GRANTING LOANS. EXPLAIN TO CUSTOMERS THE DIFFERENT**

TYPES OF LOANS AND CREDIT OPTIONS THAT ARE AVAILABLE, AS WELL AS THE TERMS OF THOSE SERVICES. OBTAIN AND COMPILE COPIES OF LOAN APPLICANTS' CREDIT HISTORIES, CORPORATE FINANCIAL STATEMENTS, AND OTHER FINANCIAL INFORMATION. REVIEW AND UPDATE CREDIT AND LOAN FILES.

OFFICE MANAGER | ADAMS BUILDING SUPPLIES | APRIL 1992 TO MAY 1999

MAINTAINED OFFICE SERVICES BY ORGANIZING OFFICE OPERATIONS AND PROCEDURES; PREPARING PAYROLL; CONTROLLING CORRESPONDENCE; DESIGNING FILING SYSTEMS; REVIEWING AND APPROVING SUPPLY REQUISITIONS. ACCOUNTS PAYABLE AND ACCOUNTS RECEIVABLE

TAX PREPARER H & R BLOCK | JANUARY 1989 TO APRIL 1995

PREPARED INCOME TAX RETURN FORMS FOR INDIVIDUALS REVIEWED FINANCIAL RECORDS, SUCH AS PRIOR TAX RETURN FORMS, INCOME STATEMENTS, AND DOCUMENTATION OF EXPENDITURES TO DETERMINE FORMS NEEDED TO PREPARE RETURN.

## Education

PIEDMONT TECHNICAL COLLEGE

- Nursing



**SENIOR Solutions  
EMERGENCY DISASTER  
PLAN**

**3420 Clemson Blvd., Unit 17  
Anderson, SC 29621  
864-225-3370  
864-225-0215 fax**

## Emergency and Evacuation Plan

### PURPOSE

The purpose of this plan is to provide guidelines to direct actions and procedures for meeting a variety of emergency situations which may affect SENIOR Solutions and its clients. This plan will identify various kinds of emergencies and will indicate the appropriate response by staff, clients, and visitors.

### INTRODUCTION

This plan is basic and can serve as an operational guide when office staff, visitors, Adult Day Care staff, Dining Site staff, Home Care Aides and Drivers are faced with various types of emergencies, both man-made and natural. It provides an instrument which will assist designated personnel to react quickly to save lives and property if the building is threatened, hit by a disaster or a major emergency of any type.

### HAZARD ANALYSIS

This section outlines the natural and man-made disasters which will be considered under this plan. A separate section and checklist will be prepared for each area addressed:

1. FIRE
2. TORNADOES
3. BOMB THREATS
4. HURRICANES

### EMERGENCY PLAN

In all cases of emergency, staff will arrange for emergency care and ambulance transportation.

1. Call 911.
2. Notify family/ caregivers

## SECTION 1. FIRE

### A. SPECIFIC INSTRUCTIONS: OFFICE STAFF, VISITORS, ADULT DAY CARE AND DINING SITE STAFF

1. In the event of fire, it should be extinguished as soon as possible by using the nearest fire extinguisher.
2. All clients, staff, and visitors should be removed from the building as quickly and quietly as possible using the nearest exit. They should be moved to an area far enough away from the building or roadway so as not to interfere with firefighters and their equipment and to provide safety to clients and staff. The last person leaving the building should make certain that the doors are closed.
3. Staff should call 911 for the Fire or Police Department and give their name, address, location, and type of fire, if known.

4. The building should not be re-entered until Fire Department personnel have deemed the building safe.

#### B. SPECIFIC INSTRUCTIONS: HOME CARE AIDES

1. In the event of fire, Home Care Aides should make certain that clients are removed from the building to an area outside which is far enough from the building or roadway so as not to interfere with firefighters or their equipment and provide safety to client(s).
2. Staff should call 911 for the fire department and give their name, address, location, name of client and type of fire. Staff should telephone SENIOR Solutions at 225-3370 or 885-1000 to report the same information as quickly thereafter as possible.
3. Staff should be certain that clients do not enter the building until Fire Department personnel have deemed the building safe.

#### C. SPECIFIC INSTRUCTIONS: DRIVERS

1. In the event of fire, drivers should stop the vehicle immediately and remove all passengers from the vehicle. Passengers should be taken to a safe area far enough from the vehicle and/ or roadway so as not to interfere with

firefighters or their equipment and to provide safety to passengers.

2. Drivers should try to extinguish the fire with the fire extinguisher on board as soon as possible. Drivers should call 911 and give their name, location, and type of fire.
3. Drivers should call SENIOR Solutions at 225-3370, 855-1000, or 461-3121 as soon as practical to report the same information.
4. Drivers should not permit passengers to re-enter the vehicle until Fire Department personnel deem the vehicle safe.

## SECTION 2. TORNADOES

### Definitions:

TORNADO WATCH -- Tornadoes are expected to develop.

TORNADO WARNING – Tornadoes have been sighted.

### A. SPECIFIC INSTRUCTIONS: OFFICE STAFF, VISITORS, ADULT DAY CARE AND DINING SITE CLIENTS AND STAFF

WHEN WEATHER CONDITIONS INDICATE A TORNADO WATCH IS LIKELY:



1. Staff should monitor the weather on the radio or watch the sky for a funnel cloud.
2. Staff should reassure clients and visitors that a WATCH is just that so no one will become unduly upset.

**WHEN A TORNADO WARNING IS ANNOUNCED:**

Staff should determine whether the building is in danger and initiate action to move clients, visitor, and staff to the innermost part of the building or take shelter under something sturdy such as a desk or heavy table.

**IF A TORNADO CAUSES DAMAGE TO THE BUILDING:**

1. Staff will call 911 and give name, address, location and extent of damage.
2. Staff should check others for injuries and begin first aid as required.
3. If exiting the building, beware of fallen power lines.

**B. SPECIFIC INSTRUCTIONS: HOME CARE AIDES**

**WHEN WEATHER CONDITIONS INDICATE A TORNADO WATCH IS LIKELY:**

1. Staff should monitor local radio or television stations or keep watching for a funnel cloud.
2. Staff should reassure clients that a watch is just that so no one will become unduly upset.

**WHEN A TORNADO WARNING IS ANNOUNCED:**

Staff should determine whether the residence is in danger and initiate action to move resident(s) to the innermost part

of the building (a closet or bathroom) or to take shelter under something sturdy such as a desk or heavy table.

#### IF A TORNADO CAUSED DAMAGE TO THE RESIDENCE:

1. Staff should call 911 and give name, client's name location and extent of damages.
2. Staff should check people in the area for injuries and should begin first aid as required.
3. If exiting the building, beware of fallen power lines.

#### C. SPECIFIC INSTRUCTIONS: DRIVERS

#### WHEN WEATHER CONDITIONS INDICATE A TORNADO WATCH IS LIKELY:

1. Drivers will attempt to complete their routes as quickly as possible. Vehicle radios should be tuned to a local station for weather updates.
2. Drivers should reassure passengers that a watch is just so that no one becomes unduly upset.

#### WHEN A TORNADO WARNING IS ANNOUNCED:

Drivers will stop their vehicles immediately and will seek a safe structure for passengers, or will instruct passengers to lie down in a low area with their hands covering the back of their heads and neck.

#### IF A TORNADO CAUSES DAMAGE:

1. Drivers will call 911 and give name, location, and extent of injuries.
2. Drivers will check passengers for injuries and will begin first aid as required.
3. Beware of fallen power lines and debris.

### SECTION 3. BOMB THREATS

#### A. SPECIFIC INSTRUCTIONS: OFFICE STAFF, VISITORS, ADULT DAY CARE AND DINING SITE STAFF

1. If a bomb threat is received, office staff, Adult Day Care Staff, Nutrition Site Staff will evacuate the building as quickly as possible.
2. Everyone should be evacuated to an area far enough away from the building or roadways as not to interfere with emergency personnel responding to an area of safety beyond the perimeter of the building where individuals will be safe from harm.
3. Staff will call 911 and give their name, location, and description of the problem.

#### B. SPECIFIC INSTRUCTIONS: HOME CARE AIDES

1. If a bomb threat is received, Staff will evacuate the residence as quickly as possible.
2. All clients should be evacuated to an area far enough from the building or roadway so as not to interfere with emergency personnel responding and far enough to ensure personal safety.
3. Staff will call 911 and give their name, location, and description of the problem.
4. Staff will call SENIOR Solutions 225-3370 or 885-1000 and report the same information.
5. No one should be permitted entry to the building until a thorough search has been completed and clearance for re-entry has been granted by the Fire or Police Department.

C. SPECIFIC INSTRUCTIONS: DRIVERS

1. If a bomb threat is received, drivers will evacuate passengers from the vehicle.
2. All passengers should be evacuated to an area far enough from the vehicle for their personal safety and so as not to interfere with emergency personnel responding.
3. Drivers will call 911 and give their name, location and a description of the problem.

4. Staff will call SENIOR Solutions 225-3370 or 885-1000, or 461-3121 and report the same information.
5. No one should be permitted entry to the building until a thorough search has been completed and clearance for re-entry has been granted by the Fire or Police Department.

#### SECTION 4. HURRICANES

##### A. SPECIFIC INSTRUCTIONS: OFFICE STAFF, VISITORS, ADULT DAY CARE STAFF, DINING SITE STAFF

1. Staff should call the County Disaster Preparedness Agency 260-4022 or 638-4200 for information on hurricane conditions.
2. Refer to Section 2 of this plan for instructions if a tornado watch or warning is issued because of hurricane conditions.

##### B. SPECIFIC INSTRUCTIONS: HOME CARE AIDES

1. Call the County Disaster Preparedness Agency 260-4022 or 638-4200 for information on hurricane conditions.

2. See Section 2 of this plan for instructions if a tornado watch or warning is issued because of hurricane conditions.

C. SPECIFIC INSTRUCTIONS: DRIVERS

1. Call SENIOR Solutions 225-3370, 885-1000, 467-3121 for information on hurricane conditions.
2. See Section 2 of this plan for instructions if a tornado watch or warning is issued because of hurricane conditions.

SECTION 5. INTRUDERS

A. SPECIFIC INSTRUCTIONS: OFFICE STAFF, VISITORS, DINING SITE STAFF

1. If, upon arrival at SENIOR Solutions notes that the building appears to have been broken into, no one should enter the building.
2. Staff should call 911 immediately
3. Staff, clients, and/or visitors should not enter the building until authorized personnel has given clearance to do so.

4. If, during office hours, someone breaks into or enters the building without authorization, office staff and visitors should attempt to subdue the intruder, but should cooperate in every way possible.
5. Staff and visitors should take note of the intruder's description for later identification.
6. After the intruder has left, staff will immediately call 911 giving their name, location and description of the problem.

**B. SPECIFIC INSTRUCTIONS: HOME CARE AIDES.**

1. If, upon arrival at a client's residence, Staff believes that someone has broken into the home, Staff should locate the nearest telephone and call 911 giving their name, location and description of the problem.
2. Staff should return to the home and remain out of sight until Law Enforcement personnel arrive or until Staff can determine that the intruder is no longer in the residence.
3. If the intruder has left, Staff should check on the client(s) and remain at the residence until Law Enforcement personnel arrive.

4. If staff is in a client's residence and an intruder breaks in, staff and client(s) should not attempt to subdue the intruder. They should cooperate in every way possible to keep themselves safe.
5. Staff should attempt to get a good description of the intruder for later identification.
6. After the intruder has left, staff will telephone 911 and give their name, location and description of the problem.
7. Staff will remain with the client(s) until Law Enforcement officials arrive.

### C. SPECIFIC INSTRUCTIONS: DRIVERS

1. If a driver notes that his/her vehicle has been tampered with or broken into, staff should telephone 911 and give name, location and a description of the problem.
2. Drivers should not enter or touch the vehicle until Law Enforcement officials arrive.
3. If, while on a route an intruder breaks into or enters the vehicle, drivers and clients should not attempt to subdue the intruder. Staff and clients should cooperate with the intruder in every way possible.
4. Staff and clients should attempt to get a good look at the intruder for later identification.



5. After the intruder has left, staff will telephone 911 and give location and a description of the problem.
6. Drivers will then telephone SENIOR Solutions 225-3370, 885-1000, 467-3120 and give the same information.
7. Drivers will remain with client(s) until Law Enforcement officials arrive.

## Continuation of Service

In the event of staff shortages, financial hardships, and inclement weather every effort will be made to continue services.

In the event of staff shortages, efforts will be made to find replacement staff to cover client appointments. In some instances, client may have to be rescheduled depending upon logistics, but given the number of total employees many staff could be reassigned to cover a particular shortage.

In the event of inclement weather, shelf stable meals will be provided to home delivered meal clients.

In the event that the LGOA does not reimburse the AAA and therefore the AAA does not reimburse SENIOR Solutions thus causing a financial hardship, SENIOR Solutions cash flow positions would be able to continue service to seniors for the AAA for about 90 days. Then unfortunately client services will be amended.

SENIOR SOLUTIONS AND SUBSIDIARY

REPORT ON CONSOLIDATED  
FINANCIAL STATEMENTS

FOR THE YEAR ENDED JUNE 30, 2015

SENIOR SOLUTIONS AND SUBSIDIARY

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## Independent Auditor's Report

Board of Directors  
SENIOR Solutions and Subsidiary  
Anderson, South Carolina

### Report on the Financial Statements

We have audited the accompanying consolidated financial statements of SENIOR Solutions (a nonprofit organization) and Subsidiary which comprise the consolidated statement of financial position as of June 30, 2015, and the related consolidated statements of activities, functional expenses, and cash flows for the year then ended, and the related notes to the financial statements.

### Management's Responsibility for the Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### Auditor's Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement. An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair

Members  
American Institute of Certified Public Accountants  
S.C. Association of Certified Public Accountants



Board of Directors  
SENIOR Solutions and Subsidiary  
November 13, 2015

presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### **Opinion**

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of SENIOR Solutions and Subsidiary as of June 30, 2015, and the changes in their net assets and their cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

### **Other Matter**

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The supplementary schedules identified in the table of contents are presented for purposes of additional analysis and are not a required part of the consolidated financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the consolidated financial statements as a whole.

### **Other Reporting Required by *Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated November 13, 2015, on our consideration of SENIOR Solutions and Subsidiary's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an

Board of Directors  
SENIOR Solutions and Subsidiary  
November 13, 2015

audit performed in accordance with *Government Auditing Standards* in considering SENIOR Solutions and Subsidiary's internal control over financial reporting and compliance.

***McKinley, Cooper & Co., LLC***

Greenville, South Carolina  
November 13, 2015

SENIOR SOLUTIONS AND SUBSIDIARY  
CONSOLIDATED STATEMENT OF FINANCIAL POSITION  
JUNE 30, 2015

ASSETS

CURRENT ASSETS

Cash and cash equivalents	\$ 1,523,497
Short-term investments	170,723
Accounts receivable	847,354
Inventory	76,900
Prepaid insurance	<u>41,516</u>

Total current assets	<u>2,659,990</u>
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PROPERTY AND EQUIPMENT, net of depreciation	<u>7,794,630</u>
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Total assets	<u>\$ 10,454,620</u>
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LIABILITIES AND NET ASSETS

CURRENT LIABILITIES

Accounts payable	\$ 496,215
Accrued salaries and payroll taxes	119,596
Accrued annual leave	67,577
Deferred revenue	4,082
Notes payable	<u>254,739</u>

Total current liabilities	<u>942,209</u>
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LONG-TERM LIABILITIES

Notes payable	<u>3,887,386</u>
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Total long-term liabilities	<u>3,887,386</u>
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Total liabilities	<u>4,829,595</u>
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NET ASSETS

Unrestricted	<u>5,625,025</u>
--------------	------------------

Total net assets	<u>5,625,025</u>
------------------	------------------

Total liabilities and net assets	<u>\$ 10,454,620</u>
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*The accompanying notes are an integral part of these financial statements.*

SENIOR SOLUTIONS AND SUBSIDIARY  
CONSOLIDATED STATEMENT OF ACTIVITIES  
YEAR ENDED JUNE 30, 2015

<b>SUPPORT, REVENUE, AND GAINS</b>	
Federal funds	\$ 221,087
State funds	165,497
Local revenue	762,770
Local in-kind	68,997
Contract revenue	5,242,809
Insurance	941,556
Gain on sale of assets	<u>13,440</u>
Total support, revenue, and gains	<u>7,416,156</u>
<b>EXPENSES AND LOSSES</b>	
Program services	
Adult day services	815,369
Assisted living	605,558
Home delivered meals	2,623,655
Senior centers and group dining	424,470
Service management and other programs	207,673
Transportation	1,226,895
Insurance	<u>661,622</u>
Total expenses and losses	<u>6,565,242</u>
<b>INCREASE IN NET ASSETS</b>	850,914
<b>UNRESTRICTED NET ASSETS, beginning of year</b>	<u>4,774,111</u>
<b>UNRESTRICTED NET ASSETS, end of year</b>	<u><u>\$ 5,625,025</u></u>

*The accompanying notes are an integral part of these financial statements.*



SENIOR SOLUTIONS AND SUBSIDIARY  
CONSOLIDATED STATEMENT OF FUNCTIONAL EXPENSES  
YEAR ENDED JUNE 30, 2015

	Program Services								Supporting Services						
	Adult Day Services	Assisted Living	Home Delivered Meals	Senior Centers & Group Dining	Service Management & Other Programs	Transportation	Insurance	Total	Office Center Overhead	Cinema Center Overhead	940 Grove Rd Overhead	Indirect Cost Pool	Fund-raising	Total	Total
Salaries	\$ 214,777	\$ 395,617	\$ 500,907	\$ 91,588	\$ 34,286	\$ 637,351	\$ 21,578	\$ 1,916,104	\$ -	\$ -	\$ -	\$ 294,852	\$ 27,591	\$ 322,443	\$ 2,238,547
Commissions	-	-	-	-	-	-	533,140	533,140	-	-	-	-	-	-	533,140
Fringe benefits	5,152	21,125	16,161	6,540	5,276	33,875	-	88,129	-	-	19	42,478	2,671	45,168	133,297
Payroll taxes	28,083	50,963	58,190	10,878	3,470	77,975	2,890	232,069	-	-	-	19,322	2,754	22,076	254,145
Vehicle lease	-	-	-	12,271	-	-	-	172,282	-	-	-	-	-	-	172,282
Fuel	-	1,631	48,876	1,099	-	115,654	-	187,263	-	-	-	5,282	-	5,282	172,545
Repairs and maintenance	11,197	7,926	27,887	6,996	3,960	45,782	-	103,748	10,070	37,946	2,342	11,449	-	61,807	165,555
Food	44,600	25,244	1,455,748	28,124	-	-	-	1,553,716	-	-	-	-	-	-	1,553,716
Building rental	-	-	-	7,235	-	-	48,000	55,235	-	-	-	-	-	-	55,235
Equipment rental	-	406	1,996	406	-	3,661	2,141	8,610	8,484	-	-	5,519	-	14,003	22,613
Insurance	24	516	7,200	1,052	576	10,904	1,276	21,548	994	2,472	3,372	15,002	-	21,840	43,388
Workers' compensation insurance	6,083	10,904	13,447	2,643	977	18,797	75	52,926	-	-	-	7,389	-	7,389	60,315
Office supplies	282	1,824	5,211	595	7	5,718	2,871	16,508	-	423	-	11,954	-	12,377	28,885
Program expense	6,941	3,143	11,185	48,315	2,250	821	-	72,655	-	-	-	1,717	-	1,717	74,372
Client supplies	2,096	814	-	-	-	-	-	2,910	-	-	-	-	-	-	2,910
Janitorial costs and supplies	1,066	4,674	519	6,305	-	79	-	12,643	14,536	40,229	349	770	-	55,884	68,527
Computer supplies and maintenance	1,112	992	20,198	1,686	-	14,433	9,515	47,936	-	-	-	40,944	-	40,944	88,880
Utilities	228	22,145	4,314	4,696	-	68	-	31,451	39,662	41,240	10,167	599	-	91,668	123,119
Telephone and communication	732	5,595	10,856	1,358	-	17,034	1,396	36,971	6,160	9,507	2,421	20,625	-	38,713	75,684
Postage	-	33	-	-	-	315	219	567	-	-	-	2,983	-	2,983	3,550
Travel	47	100	629	386	-	204	10	1,376	-	-	-	2,949	-	2,949	4,325
Training and conferences	316	93	7,255	189	-	2,936	644	11,433	-	-	-	1,556	-	1,556	12,989
Dues and licenses	1,327	2,360	600	-	75	425	25	4,812	-	-	-	3,873	-	3,873	8,685
Reserve account	-	-	-	-	-	-	-	10,511	-	-	-	-	-	-	10,511
Employment	1,969	5,043	9,363	215	27	9,953	216	26,786	-	-	-	6,032	-	6,032	32,818
Audit	-	-	-	-	-	-	-	2,900	-	-	-	14,000	-	14,000	16,900
Legal and professional fees	-	900	-	-	-	423	2,295	3,618	-	-	1,733	1,495	-	3,228	6,846
Bank charges	-	13	-	-	-	-	-	13	-	-	-	7,200	-	7,200	7,213
Interest expense	15,714	225	17,477	-	3,929	1,121	-	38,466	6,874	25,536	34,375	1,830	-	68,615	107,081
Marketing	-	3,298	13,702	160	-	1,866	21,920	40,946	-	-	-	14,758	-	14,758	55,704
Consultant	-	-	-	-	-	-	-	-	-	-	-	16,000	-	16,000	16,000
Volunteer	-	39	-	-	-	-	-	39	-	-	-	4,368	-	4,368	4,407
In-kind	-	-	16,605	51,068	-	-	-	67,673	-	-	-	1,324	-	1,324	68,997
Special events	-	-	-	-	-	-	-	-	-	-	-	-	17,207	17,207	
Depreciation	19,402	8,527	67,648	1,689	-	88,913	-	186,170	40,352	58,465	20,220	19,627	-	138,684	324,854
<b>Total before indirect allocation</b>	<b>361,148</b>	<b>574,173</b>	<b>2,315,974</b>	<b>285,485</b>	<b>54,433</b>	<b>1,266,319</b>	<b>661,622</b>	<b>5,521,154</b>	<b>127,132</b>	<b>215,838</b>	<b>74,998</b>	<b>575,897</b>	<b>50,223</b>	<b>1,044,088</b>	<b>6,565,242</b>
Cinema OI	77,509	5,383	32,686	73,417	5,383	10,765	-	205,143	-	(215,838)	-	10,695	-	(205,143)	-
Office Centers OH	44,455	-	25,521	34,929	3,175	19,052	-	127,132	(127,132)	-	-	-	-	(127,132)	-
Administration	115,431	26,002	182,057	27,582	22,019	156,014	-	529,105	-	-	-	(478,882)	(50,223)	(529,105)	-
Service management	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
940 Grove Rd OI	-	-	56,289	-	-	3,756	-	60,045	-	-	(74,998)	14,953	-	(60,045)	-
Transportation	216,826	-	11,128	3,057	-	(231,011)	-	-	-	-	-	-	-	-	-
Insurance	-	-	-	-	122,663	-	-	122,663	-	-	-	(122,663)	-	(122,663)	-
<b>Total functional expenses</b>	<b>\$ 815,369</b>	<b>\$ 605,558</b>	<b>\$ 2,623,655</b>	<b>\$ 424,470</b>	<b>\$ 207,673</b>	<b>\$ 1,226,895</b>	<b>\$ 661,622</b>	<b>\$ 6,565,242</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 6,565,242</b>

The accompanying notes are an integral part of these financial statements

SENIOR SOLUTIONS AND SUBSIDIARY  
CONSOLIDATED STATEMENT OF CASH FLOWS  
YEAR ENDED JUNE 30, 2015

<b>CASH FLOWS FROM OPERATING ACTIVITIES</b>	
Change in net assets	\$ 850,914
Adjustment to reconcile changes in net assets to net cash provided by operating activities	
Depreciation	324,854
Increase in accounts receivable	(247,101)
Decrease in inventory	273
Increase in prepaid insurance	(12,084)
Decrease in accounts payable	(1,582)
Increase in accrued salaries and payroll taxes	2,600
Increase in accrued annual leave	16,380
Increase in deferred revenue	4,082
	938,336
<b>NET CASH PROVIDED BY OPERATING ACTIVITIES</b>	
<b>CASH FLOWS FROM INVESTING ACTIVITIES</b>	
Acquisition of property and equipment	(519,825)
Disposal of property and equipment	14,576
Net change in investments	(278)
	(505,527)
<b>NET CASH USED FOR INVESTING ACTIVITIES</b>	
<b>CASH FLOWS FROM FINANCING ACTIVITIES</b>	
Proceeds from issuance of debt	102,978
Payments on long-term debt	(255,154)
	(152,176)
<b>NET CASH USED FOR FINANCING ACTIVITIES</b>	
<b>NET INCREASE IN CASH AND CASH EQUIVALENTS</b>	
	280,633
CASH AND CASH EQUIVALENTS, beginning of year	1,242,864
	1,523,497
CASH AND CASH EQUIVALENTS, end of year	\$ 1,523,497
<b>SUPPLEMENTAL DISCLOSURES</b>	
Interest	\$ 107,081

*The accompanying notes are an integral part of these financial statements.*

SENIOR SOLUTIONS AND SUBSIDIARY

NOTES TO CONSOLIDATED FINANCIAL STATEMENTS

JUNE 30, 2015

NOTE 1 – SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES AND ACTIVITIES

SENIOR Solutions was established as a non-profit corporation pursuant to the laws and regulations of the State of South Carolina on February 6, 1968, to provide transportation, meals, employment, and day care for the elderly of Anderson and Oconee counties. SENIOR Solutions receives federal, state, regional, and local funding to provide for the above services.

In 2009, SENIOR Solutions formed SENIOR Solutions Insurance Services, Inc. (the “Subsidiary”) a wholly owned for-profit corporation. The Subsidiary sells insurance policies to the elderly. Accordingly, the accounts of the Subsidiary have been consolidated with SENIOR Solutions.

**Principles of Consolidation**

The consolidated financial statements include the accounts of SENIOR Solutions and its wholly-owned subsidiary. All significant intercompany balances and transactions have been eliminated upon consolidation.

**Method of Accounting**

SENIOR Solutions maintains its books and prepares its consolidated financial statements on the accrual basis of accounting whereby revenue is recognized when earned and expenses are recorded when incurred.

**Cash and Cash Equivalents**

For purposes of reporting cash flows, SENIOR Solutions considers all investments with an original maturity of three months or less to be cash equivalents.

**Donor-Imposed Restrictions**

All contributions are considered to be available for unrestricted use unless specifically restricted by the donor. Amounts received that are designated for future periods or restricted by the donor for specific purposes are reported as temporarily restricted or permanently restricted support that increases those net asset classes. When a temporary restriction expires, temporarily restricted net assets are reclassified to unrestricted net assets and reported in the statement of activities as net assets released from restrictions.

**Inventory**

Inventory consists of frozen meals and supplies valued at cost.

**Property and Equipment**

Property and equipment over \$2,500 is capitalized at cost, except for donated property and equipment, which is recorded at fair market value at the time of the donation. Depreciation is computed on the straight-line method over estimated useful lives of five to forty years. Maintenance and repairs which do not improve or extend the useful lives of the assets are charged to expenses as incurred.

## Deferred Revenue

Deferred revenue consists of program fees paid in advance for next year's activities. None of the amounts designated as deferred revenue are considered restricted.

## Program Expense Allocation

A cost allocation plan for supporting services was in effect for the year ended June 30, 2015. This allocation is based on management's estimate of time required for the various programs.

## Financial Statement Presentation

SENIOR Solutions presents its consolidated financial statements in accordance with FASB ASC 958-205 *Not-For-Profit Presentations of Financial Statements*. Under ASC 958-205, SENIOR Solutions is required to report information regarding its financial position and activities according to three classes of net assets: unrestricted net assets, temporarily restricted net assets, and permanently restricted net assets.

## Recognition of Revenue

Contributions are recognized as revenue when they are received or unconditionally pledged.

Contributions received and unconditional promises to give are measured at their fair values and are reported as an increase in net assets.

## Income Taxes

SENIOR Solutions has obtained exemption from federal income taxes under Section 501(c)(3) of the Internal Revenue Code as an organization which is not a private foundation as well as an eleemosynary corporation recognized in South Carolina. Therefore, no provision for income taxes has been included in the consolidated financial statements.

SENIOR Solutions Insurance Services, Inc. is a for-profit entity and as such, pays federal and state income taxes.

Financial Accounting Standards Board (FASB) ASC 740-10 prescribes a comprehensive model for how an organization should measure, recognize, present, and disclose in its consolidated financial statements uncertain tax positions that SENIOR Solutions has taken or expects to take on a tax return. In accordance with FASB ASC 740-10, SENIOR Solutions recognizes the tax benefits from uncertain tax positions only if it is more-likely-than-not that the tax position will be sustained on examination by the taxing authorities, based on the technical merits of the position. SENIOR Solutions' income tax filings are subject to audit by various taxing authorities. Management believes the adoption of FASB ASC 740-10 resulted in no significant impact to SENIOR Solutions' consolidated financial statements.

## Fair Value of Financial Instruments

The carrying values of cash and cash equivalents, certificates of deposit, other receivables, due to/from related organizations, and accounts payable and accruals approximate fair value because of the terms and relative short maturity of financial instruments. The carrying values, which are the fair value of investments, are based on values provided by an external investment manager or comparison to quoted market values.

### Estimates

The preparation of the consolidated financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from these estimates.

### Donated Materials and Services

Donated materials (including facilities) and services are reflected as contributions in the financial statements at their estimated value at date of receipt.

### Investments

Investments with readily determinable fair values are valued at their fair values in the statement of financial position. Unrealized gains and losses are included in the change in net assets. Short-term investments consist of certificates of deposit with original maturities of twelve months or less.

### Concentrations of Risk

SENIOR Solutions' cash accounts are subject to potential concentrations of credit risk. Cash accounts have bank balances of \$1,533,418 and a book balance of \$1,523,497 at June 30, 2015. Of the bank balances of \$1,533,418, Federal Deposit Insurance Corporation (FDIC) or collateral covers \$873,740, while \$659,678 is not covered by insurance or collateral. Management is of the opinion that the financial institutions utilized are in sound financial position.

### NOTE 2 – ACCOUNTS RECEIVABLE

Accounts receivable at June 30, 2015, represents revenues earned but not received in the following programs:

<u>Program</u>	<u>Balances</u>
Medicaid - Adult Health Care	\$ 153,499
ACOG	184,827
Insurance Commissions	308,409
Medicaid - Transportation	171,046
CACFP Meals	9,356
Various	20,217
	<u>\$ 847,354</u>

No allowance for losses was provided at June 30, 2015, since, in the opinion of management, all accounts are considered collectible.

### NOTE 3 – INVENTORY

An inventory of frozen meals and supplies was recorded at cost for a value of \$76,900.

#### NOTE 4 – PROPERTY AND EQUIPMENT

The building and leasehold improvements include a donated building valued at \$1,402,420 based on the records in the Anderson County, South Carolina tax assessor’s office.

Property and equipment as of June 30, 2015, consisted of the following:

Land	\$	2,102,786
Building and leasehold improvements		6,235,757
Furniture and equipment		879,483
Motor vehicles		1,193,426
		<hr/>
		10,411,452
Less: accumulated depreciation		2,616,822
Total property and equipment, net of depreciation	\$	<hr/> <hr/> 7,794,630

Depreciation expense for the year ended June 30, 2015, was \$324,854.

#### NOTE 5 – INTANGIBLE ASSETS

Intangible assets as of June 30, 2015, consisted of the following:

		Agreements Not to Compete
		<hr/>
Cost	\$	120,000
Less: accumulated amortization		120,000
Intangible assets, net	\$	<hr/> <hr/> -

SENIOR Solutions is amortizing agreements not to compete cost over five years. Amortization expense for the year ended June 30, 2015 was \$0.

#### NOTE 6 – LINE OF CREDIT

On March 31, 2015, SENIOR Solutions renewed a revolving line of credit for \$300,000 from Wells Fargo Bank, N.A. The line of credit calls for interest payments at the Bank’s Prime Rate plus 1.00% to be paid on the 1<sup>st</sup> of each month, and payment in full of principal on the maturity date of April 1, 2016.

The balance outstanding at June 30, 2015, was \$0.

On August 8, 2012, SENIOR Solutions obtained a line of credit for \$300,000 from South State Bank. The line of credit calls for interest payments at 4.00% to be paid on the 15<sup>th</sup> of each month, and payment in full of principal on the maturity date of December 10, 2015.

The balance outstanding at June 30, 2015, was \$0.

**NOTE 7 – LONG-TERM DEBT**

Long-term debt at June 30, 2015, consisted of the following notes:

Note payable to a bank in monthly installments of \$1,252, including interest at 4.00 percent. The note is secured by three vehicles.	\$ 40,152
Economic Development Revenue Bond payable to a bank in monthly installments of \$22,229, including interest at 2.45 percent. The bond is secured by the revenues and receipts of SENIOR Solutions.	3,909,010
Note payable to a bank in monthly installments of \$917, including interest at 4.00 percent. The note is secured by a vehicle.	34,249
Note payable to a bank in monthly installments of \$2,047, including interest at 5.49 percent. The note is secured by two vehicles.	20,611
Note payable to a bank in monthly installments of \$1,570, including interest at 5.49 percent. The note is secured by four vehicles.	15,937
Note payable to a bank in monthly installments of \$736, including interest at 4.00 percent. The note is secured by a vehicle.	24,249
Note payable to a bank in monthly installments of \$1,490, including interest at 3.37 percent. The note is secured by five vehicles.	77,031
Note payable to a bank in monthly installments of \$379, including interest at 3.37 percent. The note is secured by a vehicle.	20,886
	<hr/> 4,142,125
Less portion payable within one year	254,739
Total long-term debt	<hr/> <u>\$ 3,887,386</u>

Scheduled maturities for notes payable were as follows:

June 30, 2016	\$ 254,739
June 30, 2017	232,662
June 30, 2018	231,907
June 30, 2019	209,941
June 30, 2020	205,346
Thereafter	3,007,530
	<hr/> <u>\$ 4,142,125</u>

**NOTE 8 - LEASES**

At June 30, 2015, SENIOR Solutions had fifteen leased vehicles from South Carolina Budget and Control Board. The monthly lease expense is based on an agreed upon standard rate for each type of vehicle and the number of miles driven each month. When the vehicles reach 100,000 miles, they are returned. Rental expense on leased vehicles for the fiscal year ended June 30, 2015, totaled \$172,282.

SENIOR Solutions leases certain office equipment under leases which expire in 2019. Future minimum lease payments under the operating leases are as follows:

June 30, 2016	\$	11,981
June 30, 2017		8,652
June 30, 2018		8,652
June 30, 2019		6,489
	\$	<u>35,774</u>

Lease expense for the year ended June 30, 2015, was \$37,968.

**NOTE 9 – RETIREMENT PLAN**

SENIOR Solutions maintains a 401(k) retirement plan which is administered by Mutual of America for all employees who have completed one year of service with 1,000 hours. SENIOR Solutions contributes 100% of the first 3% and 50% on the next 2% of gross pay the employees defer. For the year ended June 30, 2015, SENIOR Solutions contributed \$18,007 to the plan.

**NOTE 10 – DEFERRED COMPENSATION**

SENIOR Solutions maintains a Section 457(b) Deferred Compensation Plan. For eligible employees, SENIOR Solutions contributes 50% on the first 6% of the participant’s base salary. Participants in the deferred compensation program are fully vested at the time they begin contributing. For the year ended June 30, 2015, SENIOR Solutions contributed \$2,516 to the plan.

**NOTE 11 – IN-KIND CONTRIBUTIONS**

The Organization is provided the use of several buildings for no rent or reduced rent. This is reported in the statement of activities as local in-kind rent revenue and also as in-kind rent expense in the program services expense. Various donated supplies have been recorded at fair value. They are as follows:



Rent:		
Anderson - Jim Ed Rice Center	\$	38,993
Pendleton - Nutrition Center		412
Honea Path Recreation Center		6,600
Belton Community Center		5,063
Anderson County Department of Education		15,000
Supplies		2,929
	\$	<u>68,997</u>

**NOTE 12 – RELATED PARTY TRANSACTIONS**

In January 1997, SENIOR Solutions agreed to sponsor the formation of Sloan Street Housing Development Corporation, Inc. (the “Corporation”). The Corporation was formed as a non-profit, exempt organization under Section 501(c)(3) of the Internal Revenue Code of 1986 for the purpose of providing elderly persons and handicapped persons with housing facilities and services specially designed to meet their physical, social, and psychological needs. SENIOR Solutions’ duty as sponsor is to provide financial assistance and ensure the successful inception of the Corporation and its projects. In addition, certain board members and a key officer of SENIOR Solutions serve as board members and officers of the Corporation. For the fiscal year ended June 30, 2015, SENIOR Solutions did not have any transactions with the Corporation.

**NOTE 13 – CONTINGENCIES**

SENIOR Solutions must apply for annual renewals of contracts and grants. Funding is subject to both increases and reductions at the discretion of the contractors, and some agreements also call for termination by either party contingent upon certain conditions. Expenditures recorded under various contracts and grants are subject to further examination by the contractors, with reimbursements being requested for questioned costs.

**NOTE 14 – SLOAN STREET HOUSING DEVELOPMENT CORPORATION, INC.**

A nonprofit organization must consolidate a related nonprofit entity if the reporting entity controls the related entity through a majority voting interest in the board and has an economic interest in the related entity. SENIOR Solutions has not included Sloan Street Housing, Development Corporation, Inc. in its financial statements. Although many of the directors serve on both boards, SENIOR Solutions does not provide significant resources to the related entity. Sloan Street Housing Development Corporation, Inc. is self-supporting, with Senior Solutions providing only occasional small items.

**NOTE 15 – SUBSEQUENT EVENTS**

On July 1, 2015, SENIOR Solutions entered into a management agreement with Senior Centers of Spartanburg County, Inc. to oversee their operations. On October 19, 2015, SENIOR Solutions entered into a MOU to provide services in Spartanburg County for the SC Appalachian Council of Governments.

Subsequent events have been evaluated through November 13, 2015, which is the date the financial statements were available to be issued.

SENIOR SOLUTIONS AND SUBSIDIARY

SCHEDULE OF BUDGETED TO ACTUAL COSTS - BUS PURCHASE  
YEAR ENDED JUNE 30, 2015

DMT Contract #	PT-5N110-25			
	July 1, 2014 - June 30, 2015			
Contract Period:	Budget	Section 5310	Local	Variance
Performance Period:	July 1, 2014 - June 30, 2015			
<b>CAPITAL</b>				
Bus <30 ft.	\$ 52,941	\$ 42,142	\$ 7,437	\$ 3,362
Total Capital	52,941	42,142	7,437	3,362
Total Program	\$ 52,941	\$ 42,142	7,437	\$ 3,362
Approved Budget	\$ 52,941			
TI Federal Costs	42,142			
TI Local Costs	7,437			
Budget Balance	\$ 3,362			

SENIOR SOLUTIONS AND SUBSIDIARY

SCHEDULE OF BUDGETED TO ACTUAL COSTS - BUS PURCHASE  
YEAR ENDED JUNE 30, 2015

DMT Contract #	PT-4N117-58			
	July 1, 2013 - June 30, 2015			
Contract Period:	Budget	Section 5317	Local	Variance
Performance Period:	July 1, 2014 - June 30, 2015			
<b>CAPITAL</b>				
Bus <30 ft.	\$ 53,750	\$ 39,663	\$ 9,916	\$ 4,171
Total Capital	53,750	39,663	9,916	4,171
Total Program	<u>\$ 53,750</u>	<u>\$ 39,663</u>	<u>9,916</u>	<u>\$ 4,171</u>
Approved Budget	\$ 53,750			
TI Federal Costs	39,663			
TI Local Costs	9,916			
Budget Balance	<u>\$ 4,171</u>			

SENIOR SOLUTIONS AND SUBSIDIARY

SCHEDULE OF BUDGETED TO ACTUAL COSTS - BUS PURCHASE  
YEAR ENDED JUNE 30, 2015

DMT Contract # Contract Period:	PT-5N117-09			
	July 1, 2014 - June 30, 2016			
Performance Period:	Budget	Section 5317	Local	Variance
	July 1, 2014 - June 30, 2015			
<b>CAPITAL</b>				
Bus <30 ft.	\$ 53,750	\$ 39,663	\$ 9,916	\$ 4,171
Total Capital	53,750	39,663	9,916	4,171
Total Program	\$ 53,750	\$ 39,663	9,916	\$ 4,171
Approved Budget	\$ 53,750			
TI Federal Costs		39,663		
TI Local Costs		9,916		
Budget Balance	\$ 4,171			

SENIOR SOLUTIONS AND SUBSIDIARY

SCHEDULE OF BUDGETED TO ACTUAL COSTS - BUS PURCHASE  
YEAR ENDED JUNE 30, 2015

DMT Contract #	PT-5N110-62			
	July 1, 2014 - June 30, 2015			
Contract Period:	Budget	Section 5310	Local	Variance
Performance Period:	July 1, 2014 - June 30, 2015			
<b>CAPITAL</b>				
Bus <30 ft.	\$ 52,941	\$ 42,142	\$ 7,437	\$ 3,362
Total Capital	52,941	42,142	7,437	3,362
Total Program	\$ 52,941	\$ 42,142	7,437	\$ 3,362
Approved Budget	\$ 52,941			
TI Federal Costs	42,142			
TI Local Costs	7,437			
Budget Balance	\$ 3,362			

INDEPENDENT AUDITOR'S REPORT ON INTERNAL  
CONTROL OVER FINANCIAL REPORTING AND ON  
COMPLIANCE AND OTHER MATTERS BASED ON AN AUDIT OF  
FINANCIAL STATEMENTS PERFORMED IN ACCORDANCE  
WITH GOVERNMENT AUDITING STANDARDS

Board of Directors  
SENIOR Solutions and Subsidiary  
Anderson, South Carolina

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the financial statements of SENIOR Solutions and Subsidiary, which comprise the consolidated statement of financial position as of June 30, 2015, and the related consolidated statements of activities, functional expenses, and cash flows as of and for the year ended June 30, 2015, and the related notes to the financial statements, and have issued our report thereon dated November 13, 2015.

**Internal Control Over Financial Reporting**

In planning and performing our audit of the financial statements, we considered SENIOR Solutions and Subsidiary's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the financial statements, but not for the purpose of expressing an opinion on the effectiveness of SENIOR Solutions and Subsidiary's internal control. Accordingly, we do not express an opinion on the effectiveness of SENIOR Solutions and Subsidiary's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control such that there is a reasonable possibility that a material misstatement of the entity's financial

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Board of Directors  
SENIOR Solutions and Subsidiary  
November 13, 2015

statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies and therefore, material weaknesses or significant deficiencies may exist that were not identified. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

### **Compliance and Other Matters**

As part of obtaining reasonable assurance about whether SENIOR Solutions and Subsidiary's financial statements are free of material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

### **Purpose of this Report**

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the result of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

***McKinley, Cooper & Co., LLC***

Greenville, South Carolina  
November 13, 2015



## 7.2 Group Dining

### OVERVIEW

The purpose of our Group Dining Program in Spartanburg County is to provide assistance to older individuals in need of a safe and economical place to gather for a nutritious meal; to socialize with others; to obtain information on health, nutrition, and available community resources for other senior services; and to participate in a variety of other activities to improve their quality of life, and promote their health and well-being. Our goal would be to improve senior's health status and to reduce senior hunger. Using the State Unit on Aging eligible client criteria, our requirements for eligibility are: age 60 or older, spouses of eligible participants, regardless of age, disabled dependents of any age residing with our program participant and accompanying the eligible participant to the program and individuals of any age who volunteer at a dining site a minimum of five (5) hours per week. Written policies and procedures are followed for prioritizing individuals who request this service with preference given to those in greatest economic and social need.

Our goal is to maintain and/or improve the nutrition and health status and quality of life of older adults by:

- ✓ Assuring the provision of at least one meal per day, for a minimum of five days a week, that meets the nutrition requirements defined by the State Unit on Aging.
- ✓ Enhancing socialization with others and preventing social isolation.
- ✓ Providing nutrition and health/wellness education programs at least monthly.
- ✓ Offering a variety of recreational, informational, social, cultural, artistic, and musical activities each month that addresses the physical, emotional and social aspect of older persons.

Many seniors would not be able to attend our Group Dining sites without our transportation. Our transportation department is capable of transporting many clients on fixed routes from their homes to our sites. We will provide close coordination between the Nutrition Sites Coordinators and our Transportation Hub to provide quality and timely transportation service.

SENIOR Solutions' Group Dining Program shall assure that nutrition services provided under the Older Americans Act comply with general requirements, Quality Assurance Standards, and Policies and Procedures established by the State Unit on Aging.

The Site Manager completes an Information/Intake form for prospective clients that come directly to the site to determine eligibility. All client information is then provided to our Senior Access Coordinator for a more complete needs





assessment. Client information collected meets the requirements of the State Unit on Aging and Area Agency on Aging using the state computerized client data program (AIM) for assessment input.

### **7.3 GDS Staffing**

The staff necessary to provide our Group Dining program include: Executive Vice President, Group Site Managers, Information and Referral Specialist, Site Aides, and volunteer workers. The job descriptions are as follows:

- Meals Coordinator:
  - o Responsible for overseeing ordering, distribution and proper documentation and paperwork of the meals ordered.
- Group Site Manager:
  - o Responsible for the supervision of site aides and volunteers. Also responsible for properly recording and documenting intake of clients, meals prepared, and other required documentation and procedures as outlined by the State Unit on Aging. Responsible for daily ordering of needed meals.
- Information and Referral Specialist
  - o Responsible for completing full needs assessments on each potential client to ensure that their needs are properly met and they are receiving any and all services available. Responsible for filing and documenting services offered and received by each client.
- Site Aides
  - o Responsible for distributing meals to clients, ensuring clients are having an enjoyable time while at the group dining site, and ensure that the dining site is a clean and safe environment for the clients.
- Volunteers
  - o Responsible for the preparation and distribution of meals to clients. Volunteers are also responsible for aiding in socialization with the clients and clean-up of the facilities.

Each member of the staff for Group Dining sites is educated on the proper packing, serving, and heating of the meals as it falls under the criteria of Quality Assurance. Each staff member must also meet certain criteria to be able to work within the group dining sites as well as SENIOR Solutions, including a SLED background check.

### **7.4 GDS Experience/Past Performance**

SENIOR Solutions has been providing Group Dining to seniors in Anderson and Oconee Counties as a provider in the Appalachian Region for over 48 years,



since its very inception. We have been providing management oversight of senior services in Spartanburg County since May 2015 and direct service delivery for all Group Dining since August 2015 when Senior Centers of Spartanburg could no longer provide the service.

In the Appalachian Region of AAA there has never been another Group Dining provider except SENIOR Solutions. The Group Dining Program currently has an average participation rate per site, per day of:

Northwest about 60

Pacolet between 18 and 28

Woodruff between 11 and 15

## **7.5. GDS-SERVICE DELIVERY PLAN**

The Group Dining Program functions daily, Monday through Friday, to ensure that participating clients are receiving at least one meal per day as well as socialization and education on nutrition and community resources. Meals are prepared and distributed to the sites daily in order to maintain the highest quality of food for the clients. Site Managers place their orders for meals each day with the Meals Coordinator, who in turn sends the orders to the certified caterer for purchase. Clients are often brought to the sites each day by our transportation department on fixed routes. Clients that participate in the Group Dining Program often are from more economically challenged areas or areas where very few resources are available to them to receive a meal or information about other community resources.

The Group Dining staff and the transportation staff work closely together to provide safe and timely daily transportation for our clients. The NTransit Software program used by the Transportation Scheduler is a necessary resource to provide fixed routes to our sites. Data of each pickup and drop-off odometer reading and time for each client is entered by the driver and returned to the Transportation Department daily where it is entered back into the NTransit program. Reports from this data entry provide information to the Transportation Coordinator to be entered in the state-approved data collection system (AIM).

Upon entering our Group Dining Program, clients are provided with a tour of our facility, introduced to other clients and given a monthly calendar of events. Each month a new monthly calendar of events prepared by the Site Manager, under the direction of the Oconee Senior Center Coordinator or Activity Sites Coordinator, will be given to all participants outlining that month's activities and participant birthdays, anniversaries and achievements. Participant surveys are used to determine activities, entertainment, excursions and programs presented.



Client meals are ordered each day for the following day based on client attendance information gathered. Meals are purchased from a licensed caterer for five days a week that meet program nutrition and sanitation requirements. Arrangement for the provision of ethnic, religious, modified, and/or therapeutic diets, where feasible and appropriate is available. All menus are reviewed and certified by a registered dietitian for compliance with nutrition requirements specified by the State Unit on Aging. Our caterer meets all mandated State Unit on Aging Quality Assurance Standards.

## CONTROLS

Site facilities undergo Safety and Fire Inspections, fire drills as well as required DHEC inspections. Routine we are service for pest control and routine in-house maintenance inspections, repairs and upgrades are performed.

All food preparation and sanitation standards as required by the State Unit on Aging Quality Assurance Standards, are met by our certified caterer (Senior Catering). Food temperature is checked upon arrival from the caterer and any discrepancies in quantity of meal units or quality of meals are reported to The Appalachian Council of Governments.

All Activity Sites Coordinator, Site Managers and Aides are trained in CPR, First Aid and food safety training and procedures

The agency maintains and provides documentation and reports in compliance with the State Unit on Aging for Group Dining Programs. The Activity Sites Coordinator posts all data into NTransit CMS and exported to the state-approved data collection system (AIM), including meals, physical fitness, attendance, safety training, etc. The Activity Sites Coordinator is also responsible for collection, recording and handling of all daily contributions received.

Each site maintains a posted bulletin board containing all mandated documentation and notifications. SENIOR Solutions Group Dining sites have the capacity and capability to meet service requirements defined for twenty-five or more (25+) participants daily, five days a week. A private pay program is in place and offered.

Group dining drivers must meet and adhere to all requirements set for all Agency drivers. Requirements include: valid and current South Carolina Driver's License, General Background, SLED check, good Motor Vehicle Driving Record (checked annually by the Transportation Coordinator), drug screening, Confidentiality Pledge, annual Performance and National Safety Council



Defensive Drivers Training (or equivalent), knowledge of vehicle for inspection purposes and a good knowledge of streets and roads in the area served.

All agency vehicles are required to meet and be maintained using South Carolina State Fleet requirements. Drivers are required to perform a pre-inspection of assigned vehicles each day before beginning the route and report any serious concerns immediately.

Client Surveys are utilized to assess client satisfaction, complaints and areas of concern for improvement in service, safety and quality. Complaints are forwarded to the EVP for review with Activity Sites Coordinator for investigation and resolution. If deemed appropriate, the Activity Sites Coordinator may forward complaint information to the Senior Access Coordinator for additional action and follow up.

A written client grievance procedure is in place for all participants to assure that eligible individuals are not wrongfully denied service or terminated. Every enrollee is made aware of this procedure. Grievances are forwarded directly to the Executive Staff for immediate consideration. A uniform termination policy is also in place.

Clients sign a Consent for Release of Client Information Form before any information will be released to any outside agency. Our agency shall take steps no less rigorous than those we take to protect our own proprietary information to prevent the disclosure and to protect the confidentiality of the client's information. SENIOR Solutions adheres to all federal and state laws concerning confidentiality and client privacy.

Standardized Incident Reports must be completed by the Group Dining staff documenting events when needed to address client concerns, complaints or occurrences. These reports are reviewed by the Activity Sites Coordinator and appropriate action or follow-up is initiated. All disciplinary action necessary will be taken using the guidelines established in the Employee Handbook.

## METHODS

Upon enrollment in the Group Dining program, a trained Site Manager will perform an Intake on the client to assess client need. Written policies and procedures are followed for prioritizing individuals who request this service with preference given to those in greatest economic and social need. Procedures for maintaining a waiting list are in place. Applicants determined to be at high nutrition risk (having a score of 6 or more on the DETERMINE Checklist developed by the Nutrition Screening Initiative) must be given first priority for services. All client information is then provided to our Senior Access Coordinator for a more complete needs assessment. Client information collected, including, nutrition risk assessment and termination forms, where applicable, meet the



requirements of the State Unit on Aging and Area Agency on Aging using the state computerized client data program (AIM).

The Senior Access Coordinator makes the determination of any transportation needs and coordinates those services with The Transportation Coordinator. Senior Access Coordinators are required to visit meal sites twice a month and maintain availability as needed.

Group Dining Sites are located at:

Northwest Community	701 Saxon Ave	Spartanburg
T.W. Edwards Rec Ctr.	195 Coleman Circle	Pacolet
Woodruff Leisure Center	550 Calvin Road	Woodruff

Proposed Sites

Henry Place	201 Henry Place	Spartanburg
Inman Community Center		Inman
Archibald Rutledge	764 N. Church Street	Spartanburg

## SERVICE MANAGEMENT

After the intake form is completed and the client is assessed and approved for services, collected client data is entered into AIM. The Senior Access Coordinator assesses the nutritional and social needs of the client, as well as researches to find what other services the client may need and be eligible to receive. In direct conversations with the client the Senior Access Coordinator takes note of certain details, including financial situation, living conditions, family and community support. Clients often have other needs that require additional assistance, such as, medication management, transportation and legal services.

Based on this assessment, the Senior Access Coordinator facilitates referrals to appropriate departments within SENIOR Solutions, or makes referrals outside the agency once a Consent to Release Form is obtained from the client. Once qualified and accepted as an agency client, the Senior Access Coordinator will provide ongoing case management and updates by using face-to-face interviews, client-specific care plan and annual client reassessment to determine changes in services needed.

SENIOR Solutions Group Dining program fosters volunteerism from the community by offering volunteer opportunities at each group dining facility. SENIOR Solutions coordinates closely with United Way to ensure that seniors in Oconee County are receiving the necessary meals. SENIOR Solutions is also reaching out to local churches and other non-profits to promote senior nutrition and address senior hunger in Anderson and Oconee Counties.



Other organizations with interests in promoting senior adult health and wellness are encouraged to bring seniors in need to SENIOR Solutions to participate in the Group Dining program. They are also encouraged- if they have information or education to offer the clients- to come to the group dining site to speak on that information to educate the clients on nutrition, health, and other related subjects. The unified efforts also address the other many needs of older individuals and promote continued independence of the clients and the delay of institutionalization.

The Group Dining Program functions daily, Monday through Friday, to ensure that participating clients are receiving at least one meal per day as well as socialization and education on nutrition and community resources. Meals are prepared and distributed to the sites daily in order to maintain the highest quality of food for the clients. Site Managers place their orders for meals each day with the Meals Coordinator, who in turn sends the orders to the certified caterer for purchase. Clients are often brought to the sites each day by our transportation department on fixed routes. Clients that participate in the Group Dining Program often are from more economically challenged areas or areas where very few resources are available to them to receive a meal or information about other community resources.

The Group Dining Program currently has an average participation rate per site, per day of:

- |                          |       |
|--------------------------|-------|
| - Northwest Center       | 60    |
| - Pacolet                | 18-28 |
| - Woodruff Group Dining- | 11-15 |
| -                        |       |

Clients are served a balanced, nutritious meal each day that has been designed by a licensed dietician and prepared by a licensed caterer. The meals are then transported by the caterer to each group dining site.

### **7.6 GDS Community Involvement/Expansion of Services**

SENIOR Solutions Group Dining program fosters volunteerism from the community by offering volunteer opportunities at each group dining facility. SENIOR Solutions coordinates closely with United Way to ensure that seniors in Spartanburg County are receiving the necessary meals. SENIOR Solutions is also reaching out to local churches and other non-profits to promote senior nutrition and address senior hunger all throughout Spartanburg County not just in the City areas but rural areas as well. We will work closely with Clemson University SNAP program which states that Spartanburg County is one of the lowest participating counties in South Carolina in the Food Stamp program.



Other organizations with interests in promoting senior adult health and wellness are encouraged to bring seniors in need to SENIOR Solutions to participate in the Group Dining program. They are also encouraged- if they have information or education to offer the clients- to come to the group dining site to speak on that information to educate the clients on nutrition, health, and other related subjects. The unified efforts also address the other many needs of older individuals and promote continued independence of the clients and the delay of institutionalization.

### **7.7 GDS Program Requirements**

Documentation on file that is available for review include:

- ✓ Compliance documentation with all State Unit on Aging Standards for Home-Delivered Meals.
- ✓ Initial participant registration and annual information updates, nutrition risks assessment, and termination forms when applicable.
- ✓ Daily records, including; daily participant attendance, records regarding number of complete meals ordered, received and served, records of hot and cold food temperatures, action on any shortages or temperature discrepancies, comments on the nutrition service.
- ✓ Incident reports and registered complaints with documentation of follow-up on file for any fall, injury, choking, illness or other unusual event occurring in or on the grounds of the site.
- ✓ Monthly reports of planned nutrition/health education and social, educational or recreational activities, including the number of individuals taking part in each activity.

SENIOR solutions will use a sign-in sheet (generated from the LGOA data collection system) for service participants to sign by their name when they receive a meal. See example in Appendix C.

SENIOR Solutions will maintain an Individual Service Recipient File for each service recipient. The Service Recipient file shall include, but is not limited to the following: appropriate documentation of eligibility to include service recipient assessment and reassessment; service recipient service plan; service recipient confidentiality statement; and any additional documentation required in the Scope of Work.



SAMPLE

Appendix C

Provider: \_\_\_\_\_  
Site: \_\_\_\_\_  
Date: \_\_\_\_\_  
Program: \_\_\_\_\_  
Sheet No: \_\_\_\_\_

Please put a mark in the checkbox if participant will be attending tomorrow.

**Name:**

**Signature:**

_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>

Under the Penalties for perjury under State Law, I certify that this report is accurate and complete to the best of my knowledge and belief.

**Recorder:** \_\_\_\_\_  
**Total**  
**Meals:** \_\_\_\_\_

**Site**  
**Manager:** \_\_\_\_\_





## 7.9 Evidence Based Health Promotion

### OVERVIEW

The goal of the Health Promotion Services - Physical Fitness program at the SENIOR Solutions sites in Spartanburg County is to improve the quality of life for older adults, increase physical fitness, offer opportunities for education, and prevent premature institutionalization. The program concentrates on maintaining or improving health status; reducing risk factors associated with illness, disability or disease; delaying the onset of disease; preserving functional abilities; and managing chronic diseases.

We strive to serve all types of senior adults from all walks of life, but we also concentrate on helping those seniors who are:

- Living in an area of great economic need.
- Living in a medically indigent area.
- Experiencing chronic medical conditions that can improve with education and non-medical intervention.

### **CLASSES:**

- **Arthritis Exercise-Arthritis Foundation**
- Senior Solutions maintains Arthritis Exercise programs, certified by the Arthritis Foundation.
- We have one Master Trainer:
- Cathy Baier-Rogers
- And 5 certified trainer in Spartanburg County who teach or fill in for us:
- Louise Jackson
- Nancy Littlejohn
- Janet Alford
- Charlotte Means
- Garnell Waddell
- Classes are taught twice weekly at the Northwest Center. And beginning in March they will be taught at the Main Spartanburg Library.
- **Better Choices, Better Health-Stanford University**
- We also teach Better Choices Better Health classes. This class is defined by teaching people to live well with Chronic illnesses. Trainers are trained and certified by Stanford University. This class meets for 6 weeks, 2 ½ hours a week. Life skills are taught and weekly goals are set by the participants.
- We have one Master Trainer: Cathy Baier-Rogers
- And 3 certified trainers in Spartanburg County:



- Janet Alford
- Louise Jackson
- Nancy Littlejohn
  
- We teach this class 2 times a year at our senior centers and in the past has taught them as an outreach service at the YMCA, the Libraries in Spartanburg County, various Churches, and the Gibbs Cancer center.
  
- **National Diabetes Prevention Program-Lifestyle change Program-CDC**
- 
- The third Evidence based class we are just beginning this year to teach is The National Diabetes Prevention Program. 50% of the participants must be assessed with pre-diabetes by their doctor to attend. The emphasis is staving off diabetes by weight loss.
- This class is backed by and given incentives by the Eat Smart, Move More SC Programs
- This class meets 16 times in 6 months and then once a month for the next 6 months
- This class is a yearlong class. We will teach three of these this year, the first one starting in February. These classes will be taught at our centers, but with an invite through Regenisis Health, to bring in clients from the surrounding community. Currently we have two teachers trained:
  - Cathy Baier Rogers
  - Louise Jackson

## 7.10 HPS Staffing

The goal of promoting overall health, wellness, and physical fitness for senior adults requires a staff of certified and/or educated and informed staff. Staff necessary to properly run the Health Promotion Services - Physical Fitness program includes:

- VP of Senior Center Operations
  - o Responsible for overseeing all senior center and physical fitness activities as well as supervising fitness class instructors. Responsible for ensuring all safety precautions are taken to ensure optimum client safety and results. Responsible for recording and documenting all members and participation for each fitness class and other classes offered. Also



responsible for ensuring the facilities are well maintained and all fitness equipment is functioning properly. Ensures all instructors are certified or well-educated on the program they are instructing.

- Wellness Coordinator
  - o Answers directly to VP of Senior Center Operations. These instructors are all certified by Responsible for coordinating group fitness classes for the benefit of clients. Responsible for overseeing fitness equipment area for safety and proper use. Provides clients with tutorials of fitness equipment and proper use.
  
- Volunteer Instructors
  - o Responsible for instructing clients and educating clients in relation to the instructor's area of expertise. Must be well-educated and/or certified. Responsible for recording client participation and providing this documentation to the Senior Center Manager.

Disease Prevention and Health Promotion - Physical Fitness Program is planned and supervised by the Senior Center Manager in observance of standards and criteria put forth by county and state health care facilities/organizations- such as DHEC- to ensure that the facilities are safe for clients and staff. Personnel, whether paid, contracted or volunteer, including the Senior Center Manager, Wellness Coordinator, and Fitness Instructors, are required to meet specialized criteria needed to provide service to clients and SENIOR Solutions, and personnel receive on-going training, supervision and evaluation relevant to the services being provided through SENIOR Solutions.

### **7.11 HPS Experience/Past Performance**

SENIOR Solutions Physical Fitness and Senior Center facilities provide clients with many opportunities to stay physical fit and active. Programs and services provided to clients consist of planned, progressive activities that include measurable outcomes, such as:

- documentation of time spent participating in the activity
- type of activity
- pulse rate
- completed hands-on projects to improve hand-eye coordination and enhance motor skills



- self-monitoring of health related issues

The goal for each facility is to improve the overall wellness of each client, make wellness education available to clients so that each client may lead a healthier lifestyle, and provide socialization to decrease isolation. Programs, such as SmartBalance, allow clients to be well-informed about overall wellness and have the tools to incorporate wellness into their everyday lives.

Health Promotion and Physical fitness facilities are located at the following sites:

Archibald Rutledge Center

Northwest Community

T.W. Edwards Rec Ctr.

Woodruff Leisure Center

YMCA, the Libraries in Spartanburg County, various Churches, and the Gibbs Cancer center.

### **7.12 HPS Service Delivery Plan**

When first enrolling into the Disease Prevention & Health Promotion Services – Physical Fitness program, a client will be given a tour of the facilities and introduced to the program as well as other programs offered by SENIOR Solutions. The Senior Center Manager will answer any questions the client may have concerning the program and/or direct the client to the Information and Referral Specialist if the client is interested in other programs available that may benefit the client. The client will then fill out a membership application that includes the client's name, address, phone number, and other pertinent information. Once the client has provided a consent form from his or her doctor stating he or she is physically capable of exercising in the facility or signed a waiver stating he or she is able to participate in physical classes or use fitness equipment, he or she will be given an identification card with his or her name on it; this identification card will allow him or her access to the facilities through a secured door and allow him or her to check in and out of the facilities. A kiosk system is utilized to keep accurate documentation of the volume of clients coming in and out of the facilities as well as keep accurate documentation of which activities are being participated in. Every effort is given to accommodate clients who are considered to be in the greatest need of services without sacrificing older adults from other backgrounds.

Records indicating documentation of the age of all participants is available through NTransit CMS which is exported to the AIM database, as well as paper copies labeled and stored on site. Documentation describing planned services or activities and records



of participating individuals are available to the Area Agency on Aging, and/or the State Unit on Aging. In case of injury or other unusual event that occurs during physical activity events or any required follow-up activity, actions will be documented on an incident report.

Written emergency preparedness plans, standard operations for both natural and man-made emergencies, procedures for emergency closings, as well as details for evacuation of participants, shall be maintained and available to both staff and client participants, in case of a crisis.

### **7.13 HPS Community Involvement - Expansion of Services**

SENIOR Solutions encourages volunteers and other community organizations in the areas of Spartanburg County to participate with SENIOR Solutions in regards to Disease Prevention and Health Promotion - Physical Fitness Program. Volunteer instructors, who have proper education and experience, are utilized to instruct group fitness classes and other activities to aid in the promotion of overall wellness and health of each client.

We currently have many community partners supporting our evidence based curriculum, they include: CDC, DHEC in Spartanburg County and in Columbia, SC, Spartanburg Library System, Roebuck Baptist Church, AARP, and Regensis Health.

Other community organizations, such as members of SCDHEC, VCOM, City of Spartanburg, County of Spartanburg, are also encouraged to schedule informative sessions with the Group Dining Site Managers that the clients may participate in; these informative sessions provide clients with further information about various health and wellness concerns as well as other resources they can utilize to promote the greatest overall well-being they may achieve.



## 7.15 Home Delivered Meals

### OVERVIEW

The purpose of the home delivered meals program in Spartanburg County is to guarantee a reliable, balanced and nutritious meal to eligible homebound seniors in need who are unable to purchase, prepare, or otherwise obtain their own meals, or participate in the group dining program because of a mental or physical impairment. Eligible clients are defined as individuals who are ages 60 years of age and over, and homebound due to an illness; or an incapacitating disability; or otherwise isolated; spouses of eligible participants, regardless of age; and disabled dependents of any age residing with a homebound older recipient if serving that dependent is in the best interest of the older person. The participant must have a high nutrition risk. High nutrition risk means having a score of six or more on the Nutritional Health Checklist screening tool developed by the Nutrition Screening Initiative.

SENIOR Solutions recognizes that balanced nutrition is essential to maintain overall wellness and health. We have been delivering in Spartanburg for over 6 months our Choice Dine In frozen meals with great success.

When a senior doesn't eat a meal because it is not what they choose, or what they like or they don't feel like eating at that time, then the value of that meal is gone.

Dine-In® allows us to serve a better quality, low sodium, high protein meal, which costs more to make, but delivery costs are less because we deliver it once a week. Seniors love the taste, love the convenience of eating them at whatever time suits them, love the choices, they can choose between over 60 different choices.

SENIOR Solutions ensures that nutritional services provided under the Older Americans Act (OAA) comply with the general requirements set forth in the Quality Assurance Standards, Policies and Procedures established by the State Unit on Aging (SUA).

### 7.1.6 HDM STAFFING

The following is a list of employees that work in the Home Delivered Meals Program

- Vice President of HDM- Supervises all HDM employees on responsibilities. 50% of their time is dedicated to HDM
- HDM Manager- Ensures routes are as efficient as possible. Ensures all frozen meals are packed and are properly handled. Ensures all frozen meal drivers are properly trained and are in compliant with all regulations set forth by SENIOR Solutions. 100% of their time is dedicated to HDM.
- HDM Assistant - Maintains all client data in NTransit and CMS. Works closely with the Senior Access Manager to ensure are clients are being served or placed on waiting list if service is unavailable. Tracks all deliveries and handles and cancelations or returns. Inputs all mea orders for the frozen meal program Dine In. 100% of their time is dedicated to HDM.



- Meal Packers - Packs all frozen meals by client and by route. Ensures what the client orders is packed in each box for delivery. 100% of their time is dedicated to HDM.
- Kitchen Staff- Individually packs all hot meals that is brought in by bulk by Senior Catering. 100% of their time is dedicated to HDM
- HDM Drivers (Paid and Volunteers) – Delivers meals to clients. Ensure each client that is on route is delivered to in a timely and safe manner. 100% of their time is dedicated to HDM

#### **7.1.7 HDM Experience/Past Performance**

SENIOR Solutions has been a provider for the Appalachian Council of Governments for 48 years. SENIOR Solutions HDM program in June 2012- June 2013 delivered 104,116 hot meals that were provided Monday through Friday to 702 homebound clients who have little or no support from family or community. Also our Dine-in frozen meal program, where seniors choose which meals to eat, provided 402,357 low sodium, high protein meals to 1,253 clients. As you can see SENIOR Solutions continues to grow and adapt to the changes of the times and environment. We make changes that are going to help promote the mental, physical, and spiritual well-being of the senior community. SENIOR Solutions ensures that clients are provided with a proven balance of care, activity and education that allows them to continue to grow in their later years.

#### **7.18 SERVICE DELIVERY PLAN**

Resources used to perform the service of Frozen home delivered meals include: ordering and receiving, meal packing facility and staff that are dependable, reliable, efficient door-to-door delivery system using qualified drivers with reliable and properly equipped vehicles to transport the frozen meals to our clients. Meal packing facilities are located at Greenville Center in Greenville.

Frozen meal selections are based on what the client orders. SENIOR Solutions frozen meal plan called Dine In is a meal choice program. This gives the client the ability to choose from 50 different entrée selections they would like to receive each week. The frozen meals meet the needs of nutritional requirements (one-third of the recommended daily allowance for persons over 51 years of age) as required by the State Unit on Aging. Golden Gourmet has at its disposal a registered dietician who regulates compliance with nutrition requirements by reviewing menus.

Once the client has been referred to the Meals Coordinator as approved and client data is reviewed, coordination with the county Transportation Coordinator is necessary for assistance in route determination and implementation with staff drivers. The next step is having the home delivered meals assistant enter the client's data, including the type of meal, into the NTransit System and merge into an existing route. As routes are updated new door-to-door directions are generated ensuring that meals are delivered efficiently and within required time frames using the quickest most cost effective methods possible.



Total number of frozen meals are ordered daily for the following day based on routes. Our HDM Manager will run an inventory usage report from NTranist to show what frozen meals need to be pulled. The meals are pulled from our freezer and placed into chest freezers in alphabetic order. The meal packers will use a pull sheet from NTransit which shows them the clients name, address, how many meals, what type of meals need to be pulled by client. The meal packer will pack each specified box for that client for the route he/she is working on. The meals are then palletized and placed back into the freezer until the following day for delivery. The day of delivery the meal packers will place fresh fruit and fresh milk and all other supplements that complete the meal in each box and then seals up the box. The box is then loaded into a frozen meal van which has been installed with a cold guard insert; which maintains the temperature of the frozen meal. When routes are ready drivers will follow their route and document delivery of each meal, returning to the center with signed route sheets as documentation of the delivery.

## CONTROLS

On a regular schedule, our meal packing facility undergoes Safety and Fire Inspections as well as required DHEC inspections. Routinely we are serviced for pest control and routine in-house maintenance inspections, repairs and upgrades.

Meal Coordinators and kitchen staff employees are trained in food safety training and procedures, as well as continuous in-service training and are required to adhere to all DHEC standards

The agency maintains and provides information documenting compliance to the State Unit on Aging for Home Delivered Meals Programs. The Home Delivered Meals Coordinator posts all data into the state-approved data collection system (AIM). The Meals Coordinator is also responsible for collection, recording and handling of all daily contributions received.

Agency vehicles are maintained to South Carolina State Fleet maintenance standards. This is accomplished by pre-trip driver inspections, routine maintenance as specified by state fleet standards, scheduled service every 5000 miles and repairs.

Provisions are made on the route sheet for documentation of a late drop, when the client is not home and when a missed visit occurs. Client conditions or progress reports may be shown on the route sheets, however, any serious or immediate concerns are called to the Meals Coordinator or Transportation Coordinator as they occur and the driver is on site for immediate action if needed. Any issues that indicate a change in client's needs are referred to our Social Access Coordinator for reassessment or client contact. Client Surveys are utilized to assess client satisfaction. Complaints are forwarded to the Meals Coordinator or Transportation Coordinator for investigation and resolution. If deemed appropriate, the coordinator may forward complaint information to the Senior Access Coordinator for additional action and follow up.





The NTransit Software program used by the Transportation Scheduler is a necessary resource to provide fixed routes for meal delivery. Meal delivery information for each client is entered by the driver and returned to the Transportation Department daily where it is entered back into the NTransit program. NTransit program provides mapping and scheduling reports for billing entry into AIM.

SENIOR Solutions has established a *Client Grievance Procedure* applicable to all clients or prospective clients to assure that individuals with disabilities and service needs have access to the system. A written document providing step-by-step guidelines is available upon client request. Client grievances are handled on a priority basis by our Executive Staff and handled as quickly as possible.

Client confidentiality is a serious matter for SENIOR Solutions Home Delivered Meal program. Our employees and volunteers must sign a strict Confidentiality Pledge upon entering their job position. Clients must also sign a Consent for Release of Client Information Form before any information will be released to any outside agency. SENIOR Solutions adheres to all federal and state laws concerning confidentiality and client privacy.

Standardized Accident/Incident Reports must be completed by the Home Delivered Meal staff, including drivers, documenting events when needed to address vehicle accidents, client concerns, complaints or occurrences. These reports are reviewed by the Meals Coordinator or Transportation Coordinator and for appropriate action or follow-up. All disciplinary action necessary will be taken using the guidelines established in the Employee Handbook.

Documentation on file that is available for review include:

- ✓ Compliance documentation with all State Unit on Aging Standards for the Home Delivered Meals program.
- ✓ Service management activities including an individual participant file, is available, in addition to the initial assessment, annual reassessment, nutrition risk assessment, meal service plan, appropriate progress notes, and termination forms when applicable.
- ✓ Daily records, including; daily client meal delivery (individual, type, total, etc.), records regarding number of complete meals ordered and received, records of hot and cold food temperatures, action on any shortages or temperature discrepancies, comments on the nutrition service.
- ✓ Incident reports and registered complaints with documentation of follow-up on file for any unusual event occurring in or on the grounds of the meal packing site or during delivery.
- ✓ Monthly reports of planned nutrition/health education delivered.

Nutrition Education is accomplished by a program wide distribution of information reviewed and approved by a qualified nutrition educator or registered dietician. Client surveys are utilized to monitor comments and complaints. Our agency documents and provides information demonstrating compliance with SUA for all Home Delivered Meals.



Our agency also meets all reporting requirements as required by the State Unit on Aging and the Older Americans Act.

SENIOR Solutions will deliver Home Delivered Meals to the following counties:

- Spartanburg County - Frozen meals will be packed and shipped from the SENIOR Solutions Greenville Facility.

#### CARE MANAGEMENT – Waiting list

Case management may be handled by the Senior Access Coordinator (Care Manager), the Meals Coordinator or the Transportation Coordinator. Through ongoing communication and regular reassessment of client needs, personnel as stated above, monitors and implements Home Delivered Meals Service. The Senior Access Coordinator performs regular reassessments of client needs through phone and by in home visits. Annual reassessments will be performed face-to-face using criteria specified by the SUA. A written meal service plan is available, along with progress notes and daily service delivery documentation. Agency drivers also assist in case management by communicating any pertinent client feedback or changes to the Meals Coordinator or Transportation Coordinator. The agency as a whole, supports case management by implementation of client surveys with regards to food quality, preferences and service consistency. Survey results are assessed by the Senior Access Coordinator and appropriate action implemented as needed. When a reassessment is performed that indicates the client's needs have changed

1. And information is received that the client has greater needs than that client will be moved up higher on the waiting list or moved directly to the service delivery list for meals.
2. And information is received that he/she is no longer eligible for our services, a formal termination process is in place and available for client notification and a client grievance procedure is in place in the event the client feels he/she is being treated unfairly.

Documentation of service management activities including an individual participant file, is available, in addition to the initial assessment, annual reassessment, nutrition risk assessment, meal service plan, appropriate progress notes, and termination forms when applicable.

When termination of services is required, a carefully planned and documented process is conducted in accordance with the SUA standards.

#### METHODS

Home Delivered Meals service needs are received in several ways, usually by internal or external referrals. From referrals received from other agencies, churches, friends or neighbors, and family members, to needs for additional services discovered within the agency from other service areas (such as, Transportation or Group Dining), each request is handled in a standardized manner to assure fair, equal and consistent measurements are used to determine client's eligibility.



Requests and referrals received are handled by our Senior Access Coordinator and require an in-home or telephone assessment and determination procedure with prospective clients to determine eligibility and needed services. A standard Intake/Information Assessment form is used for all prospective clients. Service priority is also based on assessment of nutritional risks using the Determination Checklist, a score of 6 or more is required. The factors are; inability to prepare meals without assistance; inability to shop for food without assistance; inability to eat without assistance; and lack of adequate support from family/caregivers. All information gathered will be entered in the state based data system (AIM) for recording requirements and billing purposes by the Senior Access Coordinator and will be updated at least annually.

Very often this assessment leads to the discovery of other needs that can be provided by our agency or another community agency. Upon determination of eligibility, the Senior Access Coordinator will refer the client information to the Meal Coordinator to start the process of providing the service to the client.

If needed services are not available to a qualified client, our Senior Access Coordinator will place the prospective client on a service waiting list. This list will include: client name, address, phone number, detailed information about the needed service, why we are not able to provide needed service at this time and the date of the original request. Waiting lists are reviewed periodically and sorted by priority. Once the service is available the client will be contacted utilizing waiting list information.

### **7.19 HDM Community Involvement – Expansion of Service**

SENIOR Solutions has been providing Home Delivered Meals to the Upstate for over 48 years and has made many partnerships and formed dozens of relationships that foster cooperation and add to the ability to expand services. We collaborate with Mobile Meals, Spartanburg County, CLTC, DHEC, VCOM, United Way, City of Spartanburg.

SENIOR Solutions staff Care Management and Information and Referral Specialists will ensure that our clients get access to whatever senior service they need. Also we inform to all of our over 12,000 clients in all of our service divisions to ensure that we meet all the needs of all we serve.



## **7.21 Level 1 Home Care – Minor Home Repair**

### **PURPOSE**

The purpose of our Minor Home Repair is to provide assistance in Spartanburg County to individuals 60 years of age and older, who have a chronic illness, have limitations in two or more instrumental activities of daily living or have an acute episode of a chronic illness that affects their ability to maintain a safe and sanitary home environment without assistance. It is our goal to assist eligible clients and their families in overcoming specific barriers to maintain, strengthen, and safeguard their functioning in the home. We emphasize safety, not cosmetic repairs.

### **DOCUMENTATION**

#### **7.2.2 HCL 1 STAFFING**

Senior solutions Advocate or Service Coordinator.

#### **7.2.3 HCL 1 –EXPERIENCE**

SENIOR Solutions has been doing what Senior Centers of Spartanburg has done for over 8 years.

#### **7.2.4 SERVICE DELIVERY PLAN**

A client calls us and says they have a repair that needs done. . If it is a safety issue, we will consider the repair. The client must own their home, or have a letter from their landlord saying it is alright for repair to be done.

Safety can fall in many categories; needing a ramp to get in house, a porch or bathroom where the floor is decaying, no heat or air, or even something as simple as needing hand rails in the bathroom. We consider all these as safety concerns.

Senior Solutions Advocate goes out to the residence to do a home visit and takes a picture of the issue. The advocate does an assessment of the client. This assessment is sent to the AAA for approval. Once we receive approval we move forward with repairs.

The client must have someone to do the work for them, we don't pay for labor. If they do not, we do have churches that could send someone to help.

Whoever the workman is must evaluate and cost out what it will take to repair the issue using Home Depot prices for materials. They turn their request into the advocate. We keep our materials limit to \$1,000.



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If the repair is for more than that we would consider it a major repair and we would have to look for other community partners to pay for it.

At this point the advocate approves the clients repair cost, and sends a letter to the client with amount they are allowed to spend. The client goes to Home Depot and picks up the materials. When they get to the register, they give home Depot the letter and Home Depot calls Senior Solutions and we pay, over the phone with a credit card, the amount on the letter or less. If the total goes over, then the client must pay the difference.

After the repair is done, the Advocate for Senior Solutions goes back out to the house and takes a picture of the finished product for the file.

#### **7.25 HCL 1 -COMMUNITY INVOLVEMENT**

SENIOR Solutions meets with doctor's offices, senior housing developments, rehabilitation facilities, hospitals, hospice, and various other organizations to promote our services. Any client in need of services not currently offered by SENIOR Solutions, will be referred to another organization that best fits the client's need.



## **7.27 Transportation**

### **OVERVIEW**

SENIOR Solutions will provide Group Dining transportation in Spartanburg County in accordance with the policies and procedures established by the Area Agency on Aging, and the Lt. Governor's Office on Aging.

Program goals are to provide access to community resources for individuals with physical and/or mental impairments, who are 60 years of age and over and have mobility needs that cannot be met through other public or private systems, making it possible for them to get to group dining sites, medical appointments, pharmacy visits and grocery stores.

Transportation to eligible clients is provided using both fixed routes and demand response routes on an as needed or ongoing basis setting service priorities of who are unable to drive, do not have access to a vehicle, or have no access to affordable public transportation and must be transported to destinations and services necessary for independent living.

The purpose is to maintain personal independence or improve quality of life of older adults by providing transportation services to the eligible individuals that will enable them to:

1. Participate in social service programs in the community;
2. Provide access to the community businesses and health resources;
3. Reduce social isolation;
4. Maintain health and independence; and
5. Prevent premature institutionalization

### **7.28 TRN Staffing**

Our transportation staff in each county consists of trained, qualified drivers and a support team. At this time, our agency employs a total of over 50 transportation employee within the four county service area made up of both part-time and full-time employees. In Spartanburg County we have 8 Part time drivers.

### **Vice-President of Transportation and Senior Nutrition**

Plans, directs and coordinates all agency transportation activities, supervises agency drivers, dispatchers, schedulers, and vehicle maintenance coordinator. Reviews time schedules, and on-time performance. Ensures the department meets all AAA and LGOA policies and requirements.

### **Dispatchers/Schedulers**

Under the supervision of the Vice-President of Transportation, the Dispatch-Scheduler is responsible for the design and completion of the department's route and



vehicle schedules. The Scheduler is also responsible for implementing daily schedules, allocation of agency vehicles and the coordination of pick-ups and drop-offs of each transportation participant.

### **Vehicle Maintenance Coordinator**

Maintains all transportation vehicles as required by SCDOT South Carolina Commercial Repair Program. Documents all repairs, accidents, and incident reports. Handles all ORS, and NEMT inspections. Assists with Driver trainings.

### **Transportation Reconciliation and Billing Clerk**

Supervises all areas of the agency's transportation accounting operations, including ensuring each trip is properly billed and paid for, and ensuring all required documentation, including a client's signature are accounted for.

### **Drivers**

Drive an agency vehicle on a pre-determined route picking up and discharging passengers at designated stops. Assists passengers, door to door on and off the vehicle. Maintains driver manifests and logs. Makes assigned pickups and drop offs.

## **7.29 TRN Experience/Past Performance**

SENIOR Solutions has been providing Group Dining Transportation to seniors in Anderson and Oconee Counties as a provider in the Appalachian Region for over 48 years, and Medical Transportation as well. It was until 2007 the sole Medicaid NEMT provider in Anderson, Greenville, and Oconee Counties and since 2007 has continued to be a major provider of NEMT transportation for the Medicaid broker. Since August 1, 2015 we have been providing over 80 medical trips a day in Spartanburg County.

We will provide quality transportation services with on time performance outcomes of:

A Leg Pick Up	90%
A Leg Drop Off	95%
B Leg Pick UP	90%

By definition A Leg Pick Up is the time the client is scheduled to be picked up from their home to go to an appointment. A Leg Drop Off is the time a client is to be dropped off for their doctor's appointment. B Leg Pick UP is the time we return to pick client up from their doctor's appointment. We will have 30 minutes plus drive time from when a client calls for a return trip (B Leg Pick UP).

On time performance is critical to a successful Group Dining Program. Seniors need to be able to depend on the transportation provider picking them up and getting them to the Dining Site on time every day. If they are late they could miss an activity that is what they wanted to go for and lose interest in the program all together. The meal and socialization are what will keep the senior being able to remain in their home. If



they lose interest and don't attend because we can't get them there on time, they are denied the benefit of that very important meal and socialization.

Below is a recent Performance Report from the NEMT Broker, Logisticare for our performance for the month of October 2015.

Provider Performance Report				
Key Performance Indicators	Provider's Actual		South Carolina Actual	
<b>On-Time Performance</b>				
A-Leg Pick-Up	98.8%		89.9%	
A-Leg Drop Off	93.4%		86.5%	
B-Leg Return	91.6%		88.4%	
<b>Compliance</b>				
Insurance	100.00%		100%	
Driver Compliance	100.00%		99.44%	
Vehicle Compliance	100.00%		99.44%	

### 7.30 TRN Service Delivery Plan

SENIOR Solutions proposes to reach all areas of Spartanburg Counties where Group Dining Transportation is needed.

Our VP of Transportation and Senior Nutrition oversees the department and our Transportation HUB controls all trips, vehicles, and drivers using two software programs, Ntransit for client data, trip data, staffing, vehicle maintenance and Fleetmatics for GPS vehicle tracking.

SENIOR Solutions leases or owns 54 vehicles automobiles, conversion lift vans and ADA Lift Buses (Para-transit transport buses). All vehicles are equipped with GPS tracking and each vehicle has a mobile phone for communications. Our





Transportation HUB is either manned from 5:30 AM to 6:00 PM M-F and covered remotely 24 hours a day seven days a week.

In order to ensure that our agency serves those people the OAA targets: living below the poverty threshold; having physical or mental disabilities that pose risk for institutional placement; or cultural, social, or geographic isolation, including isolation caused by language, race, or ethnic status. Trips and Routes are determined by needs after our Care Managers do detailed assessments outlined in LGOA's Policies and Procedures Manual Effective July 1, 2015 version.

### **7.31 TRN Community Involvement**

SENIOR Solutions has been providing senior transportation to the Upstate for over 48 years and has made many partnerships and formed dozens of relationships that foster cooperation and add to the ability to expand services. We collaborate with Spartanburg County, CLTC, Spartanburg Regional Health System, the City of Spartanburg. We will continue to foster these relationships and others to better serve our Group Dining clients.

SENIOR Solutions will continue to staff Service Management and Information and Referral Specialists to ensure that our clients get access to whatever senior service they need in Spartanburg.

## Budget and Unit Cost Calculations

Offeror: SENIOR Solutions

Geographic Area: Spartanburg

RFP#APPAAA/ADRC 2015-1-Spartan

Item #	SERVICE Delivery Costs: (Enter data in Green Cells Only)	100% Budget (All Svcs)	Group Dining Meals	Home Delivered Meals	Home Care Level 1/Minor Home	Transport	Health Promotion
1	Personnel Salaries	1,971,444.28	56,370.00	1,101,293.28	0.00	544,600.00	2,000.00
2	Fringe Benefits	89,900.00	7,200.00	31,600.00		38,700.00	200.00
3	Travel (for service delivery)	548,463.00	9,463.00	53,800.00		146,800.00	2,000.00
4	Training (include training related staff travel)	8,350.00	400.00	1,800.00	2,000.00	2,550.00	800.00
5	Facility/Building cost	338,174.00	18,020.00	145,497.00	200.00	52,496.00	0.00
6	Utilities	38,950.00	4,450.00	7,500.00	0.00	27,000.00	0.00
7	Equipment	10,200.00	5,000.00	0.00	0.00	5,200.00	0.00
8	Insurance	67,037.50	2,087.50	25,200.00	250.00	31,000.00	0.00
9	Supplies	152,735.00	10,068.00	40,010.00	12,500.00	68,200.00	10,157.00
10	Raw Food/Meal Cost (Nutrition Svcs only)	1,722,250.00	80,750.00	1,587,500.00	0.00	0.00	0.00
11	Other: (specify) Repairs & Maint	112,900.00	2,400.00	25,000.00	0.00	75,500.00	0.00
12	Other: (specify) Marketing	32,925.00	125.00	15,000.00	2,000.00	800.00	0.00
13	Other: (specify) Depreciation	183,775.00	625.00	89,000.00	0.00	71,000.00	0.00
14	Other: (specify) Interest	65,144.00	188.00	42,416.00	0.00	5,000.00	0.00
15	Other: (specify) Payroll Taxes	159,987.00	5,640.00	62,000.00		61,232.00	0.00
16	Other: (specify) Vehicle Lease	204,400.00	14,400.00	45,000.00	0.00	145,000.00	0.00
17	Subtotal - Service Provision Costs	<b>5,706,634.78</b>	<b>217,186.50</b>	<b>3,272,616.28</b>	<b>16,950.00</b>	<b>1,274,878.00</b>	<b>15,157.00</b>
<b>Management (Indirect/Overhead) Costs</b>							
18	Personnel Salaries	270,000.00	7,500.00	135,000.00		90,000.00	0.00
19	Fringe Benefits	19,800.00	550.00	7,700.00		6,600.00	0.00
20	Other Overhead/Indirect Costs (Include all)	163,145.00	4,118.00	57,563.00	11,421.00	49,375.00	4,500.00
21	Other: Payroll Taxes	26,000.00	625.00	13,500.00	625.00	7,500.00	0.00
22	Other: Insurance	29,139.00	788.00	11,025.00	788.00	9,450.00	0.00
23	Subtotal - Mgmt (Indirect/Overhead) Costs	<b>508,084.00</b>	<b>13,581.00</b>	<b>224,888.00</b>	<b>12,834.00</b>	<b>162,925.00</b>	<b>4,500.00</b>
<b>Case Management/Assessment Costs</b>							
24	Personnel Salaries	35,000.00	14,000.00	12,250.00	875.00	7,000.00	875.00
25	Fringe Benefits	3,520.00	1,400.00	1,220.00	100.00	700.00	100.00
26	Contractual (Case Mgmt/Assessment only)	40,081.00		19,217.00		16,472.00	0.00
27	Other: (specify)	0.00	0.00	0.00	0.00	0.00	0.00
28	Other: (specify)	0.00	0.00	0.00	0.00	0.00	0.00
29	Other: (specify)	0.00	0.00	0.00	0.00	0.00	0.00
30	Subtotal - Case MGMT/Assessment Costs	<b>78,601.00</b>	<b>15,400.00</b>	<b>32,687.00</b>	<b>975.00</b>	<b>24,172.00</b>	<b>975.00</b>
31	Other Contractual	0.00	0.00	0.00	0.00	0.00	0.00
32	Profit	0.00	0.00	0.00	0.00	0.00	0.00
33	<b>TOTAL OPERATING BUDGET</b>	<b>6,293,319.78</b>	<b>248,167.50</b>	<b>3,530,191.28</b>	<b>30,759.00</b>	<b>1,461,975.00</b>	<b>20,632.00</b>
34	<b>Fringe Rate as % Of Salaries</b>		11.75%	3.25%	11.43%	7.17%	
35	<b>Projected Total # of Units</b>		<b>32,300</b>	<b>577,772</b>	<b>27,962</b>	<b>769,460</b>	<b>3,575</b>
36	<b>Actual Unit Cost</b>		<b>\$7.621</b>	<b>\$6.110</b>	<b>\$1.100</b>	<b>\$1.900</b>	<b>\$5.771</b>
<b>Matching Requirements</b>							
37	Minimum Required Match (10 %) is:	629,331.98	24,616.75	353,019.13	3,075.90	146,197.50	2,063.20
38	Total Cash Match (provide detail)	595,753.00	0.00	338,019.00	11,174.00	146,200.00	0.00
39	Total In-Kind Cash Equivalent (provide detail)	41,000.00	25,000.00	18,000.00	0.00	0.00	2,067.00
40	Subtotal - Available Match	636,753.00	25,000.00	354,019.00	11,174.00	146,200.00	2,067.00
41	Minimum Match Requirement Met?	YES	YES	YES	YES	YES	YES
<b>Net Unit Cost (Actual - Applied Match)</b>			<b>\$6.859</b>	<b>\$5.499</b>	<b>\$0.990</b>	<b>\$1.710</b>	<b>\$5.194</b>