

COMMUNITY BENEFITS REPORTING FORM

Pursuant to RSA 7:32-c-1

FOR FISCAL YEAR BEGINNING 10/01/2019

to be filed with:

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

Section 1: ORGANIZATIONAL INFORMATION

Organization Name Lake Sunapee Home Care and Hospice

Street Address 107 Newport Road

City New London County 07 - Merrimack State NH Zip Code 3257

Federal ID # 237066056 State Registration # 2522

Website Address: www.lakesunapeevna.org

Is the organization's community benefit plan on the organization's website? Yes

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

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

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

No IF YES, please attach the updated information.

Chief Executive: Jim Culhane 6035264077

jculhane@lakesunapeevna.org

Board Chair: Kieran Kays 6032193440

kieran.kays@newlondonhospital.org

Community Benefits

Plan Contact: Cathy Raymond 6035264077

craymond@lakesunapeevna.org

Is this report being filed on behalf of more than one health care charitable trust? Yes

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Section 1: ORGANIZATIONAL INFORMATION

Organization Name Lake Sunapee Community Health Services

Street Address 107 Newport Road

City New London **County** 07 - Merrimack **State** NH **Zip Code** 3257

Federal ID # 237066056 **State Registration #** 4463

Website Address: www.lakesunapeevna.org

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Section 2: MISSION & COMMUNITY SERVED

Mission Statement: Lake Sunapee Region VNA & Hospice provides health and hospice services for individuals and families in homes and community settings, fostering continuity of care across settings and enabling people to stay in their homes as long as possible.

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

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

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

Lake Sunapee Region VNA & Hospice serves 32 towns spanning Grafton, Merrimack and Sullivan counties: Acworth, Andover, Bradford, Canaan, Charlestown, Claremont, Cornish, Croydon, Danbury, Dorchester, Enfield, Goshen, Grafton, Grantham, Hanover, Langdon, Lebanon, Lempster, Lyme, Newbury, New London, Newport, Orange, Plainfield, Salisbury, Springfield, Sunapee, Sutton, Unity, Warner, Washington, Wilmot. Pending staff availability, other adjacent towns may be served. We are licensed to provide services in NH only.

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

Individuals of all ages and income levels receive skilled medical care, personal care and hospice care in the home setting (home can be a private residence or facility) and also benefit from our community-based clinics, wellness, bereavement and educational programs. The majority of our clients are 65+ years of age. Medicare represents our largest single source of revenue at more than 65%. Other reimbursement for care provided comes from Medicaid (approximately 5%), commercial insurances and private pay. On any given day, under normal circumstances, we have 600+ clients on service. With a staff of nearly 200 (81% of whom are direct caregivers out in the field) our people are our greatest resource, with salaries and benefits comprising more than 80% of our annual expenses. COVID-19 has had a significant impact since March of 2020. Our census dropped significantly starting late March and into the summer. However, due to a strong financial foundation to stand on and extra supports such as PPP funding, we didn't lay off a single employee. Keeping our team intact was a top priority because we knew that when volume rebounded (which it has) we would need every caregiver and support staff member in order to serve the needs of our community. Even when hours were reduced significantly, staff were paid at least 75% of regular wages. Another way we worked to keep employees whole was the establishment of a COVID-19 Employee Assistance Fund to help fill in the gaps of meeting basic needs such as rent, food, utilities etc. Much of our attention was diverted to securing PPE and developing protocols and policies to address the impact of the pandemic. Safety of staff, patients and the community was always a top priority. In a matter of days we set up remote work stations in staff homes (laptops, printers and other supplies). We convened a COVID-19 group that communicates with the State and CDC several times weekly to guide us through the crisis. Some of our Community Benefit activities were curtailed, of course, including mentoring students, internships, free Wellness and BP Clinics, "Ounce of Prevention" visits, community health presentations and more. Through it all, we stand strong in service to the community and each other and remain committed to meaningful community benefits moving forward.

Section 3: COMMUNITY NEEDS ASSESSMENT

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

2017 *(Please attach a copy of the needs assessment if completed in the past year)*

Was the assessment conducted in conjunction with other health care charitable trusts in your community? No

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

| | NEED (Please enter code # from attached list of community needs) |
|---|--|
| 1 | 120 |
| 2 | 121 |
| 3 | 122 |
| 4 | 400 |
| 5 | 526 |
| 6 | 601 |
| 7 | 603 |
| 8 | 607 |
| 9 | 610 |

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

| | NEED (Please enter code # from attached list of community needs) |
|---|--|
| A | 124 |
| B | 101 |
| C | 300 |
| D | 501 |
| E | 430 |
| F | 611 |
| G | 206 |

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

Section 4: COMMUNITY BENEFIT ACTIVITIES

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

| <i>A. Community Health Services</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|---|---------------------------------|--|---------------------------------------|
| <i>Community Health Education</i> | A D E | \$26,511.00 | \$31,813.00 |
| <i>Community-based Clinical Services</i> | D B 1 | \$197,220.00 | \$216,942.00 |
| <i>Health Care Support Services</i> | -- -- -- | | |
| <i>Other: Ounce of Prevention Program</i> | A D 7 | \$6,200.00 | \$7,440.00 |

| <i>B. Health Professions Education</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|--|---------------------------------|--|---------------------------------------|
| <i>Provision of Clinical Settings for Undergraduate Training</i> | -- -- -- | | |
| <i>Intern/Residency Education</i> | -- -- -- | | |
| <i>Scholarships/Funding for Health Professions Ed.</i> | A D 1 | \$3,500.00 | \$3,500.00 |
| <i>Other: Mentoring</i> | A D 1 | \$0.00 | \$0.00 |

| <i>C. Subsidized Health Services</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|---|---------------------------------|--|---------------------------------------|
| <i>Type of Service: Bereavement Program</i> | 3 E D | \$12,085.00 | \$13,291.00 |
| <i>Type of Service: Respite Scholarships</i> | F B D | \$3,842.00 | \$3,842.00 |
| <i>Type of Service: Commercial Insurance Loss</i> | A B 1 | \$229,657.00 | \$241,140.00 |
| <i>Type of Service:</i> | -- -- -- | | |
| <i>Type of Service:</i> | -- -- -- | | |

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

| <i>E. Financial Contributions</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|--|---------------------------------|--|---------------------------------------|
| <i>Cash Donations</i> | -- -- -- | | |
| <i>Grants</i> | -- -- -- | | |
| <i>In-Kind Assistance</i> | A B E | \$11,015.00 | \$13,219.00 |
| <i>Resource Development Assistance</i> | -- -- -- | | |

| <i>F. Community Building Activities</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|---|---------------------------------|--|---------------------------------------|
| <i>Physical Infrastructure Improvement</i> | -- -- -- | | |
| <i>Economic Development</i> | -- -- -- | | |
| <i>Support Systems Enhancement</i> | C E D | \$4,780.00 | \$6,373.00 |
| <i>Environmental Improvements</i> | -- -- -- | | |
| <i>Leadership Development; Training for Community Members</i> | E A F | \$2,555.00 | \$3,067.00 |
| <i>Coalition Building</i> | A D 1 | \$3,850.00 | \$4,235.00 |
| <i>Community Health Advocacy</i> | A B 1 | \$9,550.00 | \$10,505.00 |

| <i>G. Community Benefit Operations</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|---|--|---|--|
| <i>Dedicated Staff Costs</i> | A 1 D | \$2,100.00 | \$2,100.00 |
| <i>Community Needs/Asset Assessment</i> | -- -- -- | | |
| <i>Other Operations</i> | -- -- -- | | |

| <i>H. Charity Care</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|---|--|---|--|
| <i>Free & Discounted Health Care Services</i> | A B 1 | \$76,018.00 | \$79,819.00 |

| <i>I. Government-Sponsored Health Care</i> | <i>Community Need Addressed</i> | <i>Unreimbursed Costs (preceding year)</i> | <i>Unreimbursed Costs (projected)</i> |
|--|--|---|--|
| <i>Medicare Costs exceeding reimbursement</i> | -- -- -- | | |
| <i>Medicaid Costs exceeding reimbursement</i> | B A E | \$291,340.00 | \$305,907.00 |
| <i>Other Publicly-funded health care costs exceeding reimbursement</i> | B A 1 | \$44,377.00 | \$46,596.00 |

Section 5: SUMMARY FINANCIAL MEASURES

| <i>Financial Information for Most Recent Fiscal Year</i> | <i>Dollar Amount</i> |
|--|----------------------|
| <i>Gross Receipts from Operations</i> | \$10,311,638.00 |
| <i>Net Revenue from Patient Services</i> | \$9,988,605.00 |
| <i>Total Operating Expenses</i> | \$11,219,292.00 |
| | |
| <i>Net Medicare Revenue</i> | \$7,042,970.00 |
| <i>Medicare Costs</i> | \$6,549,962.00 |
| | |
| <i>Net Medicaid Revenue</i> | \$541,060.00 |
| <i>Medicaid Costs</i> | \$832,400.00 |
| | |
| <i>Unreimbursed Charity Care Expenses</i> | \$2,423.00 |
| <i>Unreimbursed Expenses of Other Community Benefits</i> | \$924,600.00 |
| <i>Total Unreimbursed Community Benefit Expenses</i> | \$927,023.00 |
| | |
| <i>Leveraged Revenue for Community Benefit Activities</i> | \$157,244.00 |
| <i>Total Community Benefits including Leveraged Revenue for Community Benefit Activities</i> | \$1,084,267.00 |

Section 6: COMMUNITY ENGAGEMENT in the Community Benefits Process

| <i>List the Community Organizations, Local Government Officials and other Representatives of the Public consulted in the community benefits planning process. Indicate the role of each in the process.</i> | <i>Identification of Need</i> | <i>Prioritization of Need</i> | <i>Development of the Plan</i> | <i>Commented on Proposed Plan</i> |
|---|-------------------------------|-------------------------------|--------------------------------|-----------------------------------|
| 1) See below | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 9) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 10) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 11) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 12) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 13) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 14) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 15) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 16) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 17) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 18) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 19) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 20) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 21) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 22) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 23) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 24) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 25) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Please provide a description of the methods used to solicit community input on community needs (attach additional pages if necessary): 2017 CHNA Final Report & Addendums available at www.lakesunapeevna.org

Section 7: CHARITY CARE COMPLIANCE

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

List of Potential Community Needs for Use on Section 3

100 - Access to Care; General

- 101 - Access to Care; Financial Barriers
- 102 - Access to Care; Geographic Barriers
- 103 - Access to Care; Language/Cultural Barriers to Care
- 120 - Availability of Primary Care
- 121 - Availability of Dental/Oral Health Care
- 122 - Availability of Behavioral Health Care
- 123 - Availability of Other Medical Specialties
- 124 - Availability of Home Health Care
- 125 - Availability of Long Term Care or Assisted Living
- 126 - Availability of Physical/Occupational Therapy
- 127 - Availability of Other Health Professionals/Services
- 128 - Availability of Prescription Medications

200 - Maternal & Child Health; General

- 201 - Perinatal Care Access
- 202 - Infant Mortality
- 203 - Teen Pregnancy
- 204 - Access/Availability of Family Planning Services
- 206 - Infant & Child Nutrition
- 220 - School Health Services

300 - Chronic Disease – Prevention and Care; General

- 301 - Breast Cancer
- 302 - Cervical Cancer
- 303 - Colorectal Cancer
- 304 - Lung Cancer
- 305 - Prostate Cancer
- 319 - Other Cancer
- 320 - Hypertension/HBP
- 321 - Coronary Heart Disease
- 322 - Cerebrovascular Disease/Stroke
- 330 - Diabetes
- 340 - Asthma
- 341 - Chronic Obstructive Pulmonary Disease
- 350 - Access/Availability of Chronic Disease Screening Services

360 - Infectious Disease – Prevention and Care; General

- 361 - Immunization Rates
- 362 - STDs/HIV
- 363 - Influenza/Pneumonia
- 364 - Food borne disease
- 365 - Vector borne disease

370 - Mental Health/Psychiatric Disorders – Prevention and Care; General

- 371 - Suicide Prevention
- 372 - Child and adolescent mental health
- 372 - Alzheimer's/Dementia
- 373 - Depression
- 374 - Serious Mental Illness

400 - Substance Use; Lifestyle Issues

- 401 - Youth Alcohol Use
- 402 - Adult Alcohol Use
- 403 - Youth Drug Use
- 404 - Adult Drug Use
- 405 - Youth Tobacco Use
- 406 - Adult Tobacco Use
- 407 - Access/Availability of Alcohol/Drug Treatment

- 420 - Obesity
- 421 - Physical Activity
- 422 - Nutrition Education
- 430 - Family/Parent Support Services

500 – Socioeconomic Issues; General

- 501 - Aging Population
- 502 - Immigrants/Refugees
- 503 - Poverty
- 504 - Unemployment
- 505 - Homelessness
- 506 - Economic Development
- 507 - Educational Attainment
- 508 - High School Completion
- 509 - Housing Adequacy

520 - Community Safety & Injury; General

- 521 - Availability of Emergency Medical Services
- 522 - Local Emergency Readiness & Response
- 523 - Motor Vehicle-related Injury/Mortality
- 524 - Driving Under Influence
- 525 - Vandalism/Crime
- 526 - Domestic Abuse
- 527 - Child Abuse/Neglect
- 528 - Lead Poisoning
- 529 - Work-related injury
- 530 - Fall Injuries
- 531 - Brain Injury
- 532 - Other Unintentional Injury

533 - Air Quality
534 - Water Quality

600 - Community Supports; General

601 - Transportation Services
602 - Information & Referral Services
603 - Senior Services
604 - Prescription Assistance
605 - Medical Interpretation
606 - Services for Physical & Developmental Disabilities
607 - Housing Assistance
608 - Fuel Assistance
609 - Food Assistance
610 - Child Care Assistance
611 - Respite Care

999 – Other Community Need