Greetings Loretto Family and Friends,

Late last year, concluding nearly two years of work engaging Loretto residents, participants, families, employees, board members, volunteers and donors, the Loretto Board of Trustees approved adoption of the 2011-2020 Loretto Strategic Plan. This significant achievement will guide our family of care into the next decade, guaranteeing that Loretto’s future is one of leadership in elder care, informed by a holistic, person-centered philosophy and positioned to respond to the dynamic needs of elders in our community.

Loretto worked with hundreds of partners, both internal and external, to generate input for our strategic plan. Volunteers were asked to participate in one of several learning communities. These inter disciplinary groups explored several relevant content areas such as holistic care, technology and provider of choice. Their integrated findings were used as the context for the development of Loretto’s 2011-2020 Strategic Plan.

During the planning process, Loretto also engaged its diverse stakeholders in assessing our mission, vision, values, and manner of serving elders. These deliberations ultimately led us to revise Loretto’s mission statement and articulate our identity, values and vision in new ways.

The passion, engagement and intellectual capital of all who have participated in this journey is a testament to all that Loretto has accomplished over the past 85 years.

Sally Berry
Interim CEO and President
Loretto’s commitment to engage in a meaningful strategic planning process was driven in no small part by critical societal factors affecting the field of aging. These factors, explored during the strategic planning process, include an aging population, a restructured national economy and changing models of care:

- The large numbers of the “baby boom” generation moving into their elder years over the next two decades will have a significant impact on shaping the nature of long-term care services and settings.

- Long-term care organizations need to adapt their service philosophies to be ready for changing consumer values, which are strongly driven by the desire for independence and choice in how elders seek and accept services.

- Today’s economic realities will drive a need for ever-increasing efficiencies, adjustments in financial models and a need to find new sources of revenue.

- The emphasis on service coordination and managed care driven by federal and state healthcare reform means long-term care organizations must develop or expand programs of this nature.

- A shrinking workforce means long-term care organizations will face heavy competition for workers. Investments in the recruitment, retention and development of employees will be critical to success.
Since 1926, Loretto has been committed to caring for older adults with the stated mission “to improve the quality of life for older adults in Central New York.” Over the past decades, the breadth and depth of Loretto’s role in the community has grown as it responded to needs and explored the most meaningful ways to serve elders and their families.

Now, drawing on its historical roots and current foundation, the organization readies itself for a significant and dynamic future role. To define this role and propel the organization toward it, a new mission statement and new identity statement were established and embraced in 2010.

Our New MISSION...

Loretto, rooted in a rich heritage of faith, honors, serves, and empowers every elder and those who care for them to live with purpose, wholeness, and dignity.

Our New VISION...

Loretto will transform the face of elder care in Central New York.

Our New IDENTITY STATEMENT...

At Loretto we embrace aging. We succeed only when we meet or exceed the expectations of all whose lives we touch. We have a passion for excellence and will deliver the highest standards of integrity and fairness. We celebrate the diversity of people, ideas and culture. We honor the dignity and value of individuals without distinction. We improve the communities in which we work and live. We encourage innovation, accept accountability and inspire change. We seek knowledge and growth through continuous learning.
STRATEGIC PLANNING

Three major themes emerged from our strategic planning process:

Provider of Choice
The Loretto family of care knows that achieving mere patient satisfaction is not enough to become provider of choice in Central New York. Instead, we must strive to empower and accommodate patients in a way that fosters their loyalty. This means doing more than meeting patients’ needs. By actively engaging patients, Loretto seeks everyday to understand what they want from their care experience. We believe the most powerful reputation is built by word-of-mouth communication from current participants. What they say to their families and friends in the community is immensely powerful. That’s why Loretto continues to strengthen its focus on individual, person-centered care that empowers elders to lead their best lives.

Employer of Choice
Loretto’s employees are its most valuable resource. Experience and research show that as happiness and satisfaction increase in employees, so too do quality and productivity. We all know, as employees, that the quality of our work lives impacts everything from our productivity to our home lives. Even our physical health can be improved or worsened by our work environments and experiences. That’s why Loretto strives to be an employer of choice, engaging each member of our family of care through communication, professional development, and recognition. Understanding the needs and vision of our employees is the key to fulfilling the needs and vision of our organization.

Sustainability
Uncertainty equals risk. Understanding how uncertainty impacts Loretto’s financial well-being has never been as important as it is today. Sustainability is about strengthening Loretto’s financial picture against the backdrop of volatility. Making smart investments with its time, human and financial capital, Loretto is creating a business model that will not only survive periods of intense economic and political uncertainty, but thrive during them.
Loretto’s 2010 Faces of Loretto benefit calendar featured the story of Beatrice Lattimer, then a Buckley Landing resident. The story of Beatrice surprising volunteer Nancy Watson with her harmonica skills at a sing-a-long has become one of Loretto’s proudest. Before Beatrice passed away later in 2010 the pair spent quality time playing the harmonica and singing together, becoming “a great musical duo.”

Beatrice was one of over 6,000 individuals each year touched by Loretto’s services. Her story represents Loretto’s dedication to building an elder-centered community through the adoption of the principles of person-centered care, using a holistic approach, and focusing on quality. This approach is found throughout Loretto, in the comprehensive all-inclusive care of PACE CNY, in our housing sites, day care programs and skilled nursing settings.

From our independent housing settings to our specialized dementia programs, people live with dignity, supported by Loretto staff who not only care for them but also care about them.
EMPLOYER
OF CHOICE

Loretto employs more than 2,000 people in Central New York. We strongly believe in celebrating and recognizing their work, ensuring effective communication that keeps them informed and involved, and on-going training and education to help them maintain and grow their skills and knowledge.

Retaining, recognizing, and recruiting exceptional talent remains a top priority at Loretto. In 2010 Loretto employees were honored for their efforts through organization-wide celebration events and numerous daily, weekly, or monthly initiatives acknowledging their dedication and hard work.

To increase employee communication, build understanding, and promote relationships, Loretto leadership in 2010 began hosting “Listening Sessions” four to five times per month with Loretto employees at all of its sites and departments. These sessions allow senior management and front line staff the opportunity for open and honest communication - a vital part of Loretto’s strategic approach to elder care.
SUSTAINABILITY

A diverse revenue portfolio is more critical than ever in an environment characterized by volatility in healthcare reimbursement structures. To support immediate needs and position itself for the future, Loretto is working to find new or expanded financial support.

Loretto Foundation
In 2010 the Loretto Foundation Board of Trustees, which had been functioning for several years as a part of Loretto’s corporate Board of Trustees, was re-established. This action reflects a re-energized commitment to a robust fund development effort intended to enhance private giving in support of Loretto’s programs and special initiatives. The Foundation’s efforts will focus on building the organization’s annual support, endowment and planning and implementing a future capital campaign.

Grants
Continued funding was secured from the US Department of Housing and Urban Development (HUD) for a series of renovations at The Bernardine, one of Loretto’s assisted living sites. Funding received in 2010 was the ninth award granted to Loretto by HUD toward a multi-year comprehensive renovation project to convert apartments to full handicapped accessibility and create more common space for use by residents. Funding was also secured through NYSERDA and the Weatherization Assistance Program for projects to improve energy efficiency in Loretto buildings and a grant from the NYS Department of Transportation helped in the purchase of new buses for PACE CNY to use to transport program enrollees.

Continuous Quality Improvement
In 2010 Loretto implemented a new continuous quality improvement initiative to improve the Loretto experience. A major part of the initiative is Lean Six Sigma, a program designed to help Loretto employees achieve excellence through elimination of waste and overall process improvement. In 2010 twenty employees participated in the Lean Six Sigma yellow belt training. They learned how to implement fundamental concepts and tools while working on real Loretto projects like reducing overtime, improving mail delivery, and improving the process of transitioning residents from one Loretto program to another.
The total number of individuals served by Loretto Programs and Services in 2010 was 6,035.

**Home and Community-Based Care Services**
- Daybreak Adult Medical Day Centers: 218
- Loretto Lifeline: 1,933
- Loretto Utica Adult Day Health Care: 54
- PACE CNY: 486

**Senior Housing**
- The Bernardine: 204
- Buckley Landing: 119
- Community Residences: 38
- Forest View at Fayette: 20
- The Heritage: 124
- Highland House: 12
- Loretto Utica Adult Home: 126
- Malta House/Malta Manor: 103
- The Nottingham: 392
- O’Brien Road Apartments: 49
- Sedgwick Heights: 217

**Skilled Nursing**
- Loretto Health & Rehabilitation Center: 1,647
- Cunningham Skilled Nursing
- Fahey Rehabilitation Center

- Loretto Utica Residential Health Care Facility: 253
- The Nottingham Residential Health Care Facility: 40

**Total: 6,035**

**2010 Revenue & Expenditures**
- Grants/Fundraising: $3,561,340
- Medicare: $22,526,690
- Private & Commercial: $29,808,015
- Medicaid: $60,337,488

Total: $116,233,533

**2010 Expenses by Service Area**
- Housing: $24,875,608
- Clinic/PACE/Day Care: $30,788,118
- Skilled Nursing: $61,353,216

Total: $117,016,942

**Specialized Health Care Services**
- McAuliffe Health Center
  - Dental: 2,905
  - Podiatry: 2,075
  - Optometry: 242
  - Total Visits: 5,222

**Food Services**
- AdvancedMeal
  - In addition to Loretto, AdvancedMeal also serves non-affiliated skilled nursing facilities, community-based nutrition programs and school districts throughout New York State. In total, AdvancedMeal served 6,434,193 meals in 2010.
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2010 Care Programs & Services

**Home and Community-Based Care Services**
- Daybreak Adult Medical Day Centers
- Loretto Lifeline
- Loretto Utica Adult Day Health Care
- PACE CNY (Program of All-inclusive Care for the Elderly)

**Food Services**
- AdvancedMeal

**Senior Housing**
- The Bernardine
- Buckley Landing
- Community Residences
- Forest View at Fayette
- The Heritage
- Highland House
- Loretto Utica Adult Home
- Malta House
- Malta Manor
- The Nottingham
- O’Brien Road Apartments
- Sedgwick Heights

**Skilled Nursing**
- Loretto Health & Rehabilitation Center
  - Cunningham Skilled Nursing
  - Fahey Rehabilitation
- Loretto Utica Residential Health Care Facility
- The Nottingham Residential Health Care Facility

**Specialized Health Care Services**
- McAuliffe Health Center

For more information about Loretto programs and services, please call (315) 469-1991 or go to www.loretto-cny.org.