

# Tidewell Hospice, Inc.



## SUMMARY

### Mission

The mission of Tidewell is to help people live well by providing care, comfort and compassion. This is accomplished by providing the highest quality of care to patients living with advanced illness and their families. The primary goal is to honor patient and family choices through individualized programs and services.

### Contact Information

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### General Information

<b>Nonprofit</b>	Tidewell Hospice, Inc.
<b>Former Names</b>	

TideWell Hospice and Palliative Care, Inc.

Hospice of Southwest Florida

<b>Tax Exempt Status</b>	Public Supported Charity
<b>Incorporation Year</b>	1980
<b>Awarded Community Foundation Grant</b>	Yes
<b>Community Foundation Conducted a Site Visit</b>	No
<b>State Charitable Solicitations Permit</b>	Yes Mar 2018
<b>State Registration</b>	0

# BACKGROUND & NEEDS

## Impact Statement

Hospice improves quality of life for terminal patients while reducing the financial burden on our healthcare system and the patient's family. By managing pain and symptoms, medical crises are averted thereby reducing costly emergency room visits and other hospitalizations.

Recent accomplishments include:

- more than \$3 million of uncompensated charitable hospice care and program services
- hospice care for 8,879 patients and grief support for 7,161 individuals
- created the Grief Support Call Center to improve access to bereavement services
- reaccreditation from The National Institute of Jewish Hospice
- implemented online learning management system for all clinical and nonclinical staff
- served 2,046 Veteran patients and named a Level-4 partner – the highest status achievable – in the National Hospice and Palliative Care Organization's "We Honor Veterans" program
- named "Healthiest Employer" (in its category) by *Tampa Bay Business Journal* and received a Gold Level Well Workplace Award from the Wellness Council of America
- maintained accreditation with deemed status from the Community Health Accreditation Partner (CHAP), demonstrating the highest level of excellence
- five-star rating on all five dimensions of the Family Evaluation of Hospice Care (a survey approved by the Florida Agency for Healthcare Administration)

### GOALS

1. Refine service delivery system.

- Implement a technology based referral program
- Refine admissions intake process from first point of contact through transition to clinical care

1. Maintain a five-star rating

- Continue to implement, use and monitor Assessment Intervention and Measurement (AIM) indicators.

1. Ensure financial soundness

- Proactively adjust expenditures to offset expected decreases in reimbursement to maintain consistency of service, quality and profitability.

1. Develop an academic culture at Tidewell through the creation of an 'Institute' to house research and educational activities

2. Achieve incremental growth and maximize market penetration

## Needs Statement

Annually, Tidewell provides approximately \$4 million in unreimbursed services to patients and families throughout Southwest Florida through philanthropic support.

The five most significant areas of need are:

Charity Care: annually covers in excess of \$2 million in end-of-life care for low-income, medically indigent, under-insured and uninsured patients and families.

Bereavement Programs: provides grief support, free of charge, as a community service to anyone who has lost a loved one, regardless of whether or not that person was served by Tidewell.

Children's Services: cares for children who are profoundly ill, severely injured, struggling with chronic life-limiting conditions, or are facing the final phase of life. Unfunded specialized services include music therapy, medical play techniques and family counseling.

Complementary Therapies: provides comfort by alleviating pain through therapeutic techniques that reduce the need for medications, allowing for more quality time between patient and family.

Tidewell Honors: Veterans often face both physical and psychological issues at the end of life and their care requires special sensitivity. Honors focuses on celebrating veterans and addressing their unique end-of-life needs and concerns.

## Background Statement

For 38 years Tidewell has been the sole provider of hospice and palliative care to Southwest Florida, offering a wide range of medical, therapeutic and supportive programs that bring quality of life to patients facing terminal illness. Tidewell is one of the largest hospice organizations in the nation with a clinical and non-clinical staff of 714 and 1,002 trained volunteers providing end of life services for 8,450 patients and their families annually – averaging 1,100 patients each day. Additionally, 10,000 individuals attend Tidewell's individual and group counseling sessions each year.

Home-based comfort care is the basic premise of hospice. The reassurance of being at home, surrounded by loved ones and personal belongings is the cornerstone of hospice care. Tidewell understands hospice is also a program of care and support *wherever* patients need it. It is in this spirit that the Hospice House program was established and continues to be an important element in today's options of services.

Tidewell's hospice programs are available to anyone with advanced illness – regardless of age, gender, ethnicity, diagnosis, belief system or financial situation.

### History

Former Sarasota Memorial Hospital Foundation President, Charles Estill is considered the founding father of hospice in Sarasota County. Through his influence, Estill was able to carve out a two-room office for hospice inside the hospital. In the first year of operation, 66 patients were cared for. By the end of 1981, hospice moved to its own Sarasota location followed by its first satellite office in Venice.

In 1982, Congress enacted legislation creating a hospice benefit under Medicare. Hospice which had relied solely on donations to fund operations, would now be part of the Medicare system. Hospice of Sarasota County became Medicare certified in 1985 and patient census climbed close to 1,000 by the end of the 1980s.

In 1988, the program admitted its first Manatee County patients, and with that, came a name change more reflective of hospice's new service area – Hospice of Southwest Florida.

Expansion soon included Charlotte and DeSoto counties, and the first Hospice House opened in Venice in June 1993. Subsequent houses were built in Bradenton, Sarasota, Port Charlotte, Ellenton, Englewood and Arcadia. In the fall of 2005, Hospice of Southwest Florida became Tidewell Hospice moving into a new era in its development and distinguishing itself as a premier end-of-life health care provider.

## Statement from the Board Chair

Hospice reflects the best model and stated goals of healthcare efficacy by being patient-centric; using a multidisciplinary care team; coordinating across venues (home, assisted living, hospital); and by reducing

hospitalizations. This approach enhances quality of life and often extends the length of life – especially when hospice care is received early after diagnosis.

Hospice is by far the best way to care for people at the end of life – providing the best results at the least cost.

I am honored to serve on Tidewell's board as Tidewell distinguishes itself by providing a full array of programs and services that bring quality of life to those with advanced illness. We strive to treat the whole person – fulfilling physical, psychological and spiritual needs – viewing the patient and his or her family as a unit.

And Tidewell provides these services to all – regardless of ability to pay. Unlike hospitals, Tidewell receives no government funds to care for the uninsured and relies totally on philanthropic support.

We are committed to providing a peaceful end-of-life experience with dignity for all patients – regardless of their financial circumstances. Nurses and music therapists help with pain management and instruct care givers on techniques to provide further relief. A social worker provides counseling and access to social service agencies. Grief specialists visit patient and family before and after the death occurs. Tidewell's Humanitarian Fund helps families pay for funeral services or other non-medical emergencies.

Together, we celebrate life and find joy in each day.

Thank you for your interest in and support of Tidewell.

Michael R. Uselton

Chair

## Statement from the CEO/Executive Director

Most patients' primary end-of-life hopes are to be pain-free, have distressing symptoms controlled and to be with loved ones. Their quality of life revolves around these factors and only when these are well-managed can they begin to heal mind and spirit.

This is the role Tidewell plays in the lives of well over 8,000 patients each year. Our patients and their families are by far the most articulate in expressing Tidewell's impact on their lives. *"My father did not go to hospice to die. He went to live his last days to their fullest." "Hospice is the beginning of an end – but it is not the end. It is for my survival of the end."*

While Tidewell is providing end-of-life care for more people than ever before, for far too many relief is measured in days and weeks when it could – and should – be counted in months. Equally distressing are the numbers of patients with no access to the peace, dignity and compassion afforded by Tidewell Hospice. The unfortunate result is a diminished quality of life and often, a shortened lifespan.

Over our 36-year history, everyone associated with Tidewell has worked with a passion. And while the work we do can be both professionally and emotionally challenging, two factors have enormous impact on our team. The first is knowing that because of donors, Tidewell will never turn away a patient in need. The second is the astonishing demonstration of strength and depth of love among the families we serve. Together, they and our donors sustain us.

Tidewell's vision is to continue to provide superior care to all who need it – for as long as they need it – regardless of ability to pay. The increasing costs of providing this comprehensive care and the decreasing reimbursements from Medicare and private provide us with new challenges each year.

Hospice provides hope and quality time with the people we hold dearest. Your support of our mission and programs is what allows us to bring that hope to your neighbors and your loved ones.

Thank you.

Gerry Radford, ACHE

President and CEO

**Areas Served**

- FL- Charlotte
- FL- DeSoto
- FL- Manatee
- FL- Sarasota

**Service Categories**

**Primary Organization Type**

Health Care

# PROGRAMS

## Tidewell Children's Services

### **Description**

The mission and vision of Tidewell Hospice is to foster a setting in which families experience greater peace of mind and physical comfort so they can maximize the time they have together. That is achieved, first and foremost, with expert management of the patient's pain and distressing symptoms. Next, spiritual counseling and grief support is introduced. It then becomes possible for patients and families to enjoy quality-of-life activities and projects, sharing moments of peace, joy and renewed hope. During the process of engaging in activities led by Children's Services care team members, patients and loved ones interact and build positive memories that last a lifetime.

### **Budget**

\$259,900.00

### **Category**

Health Care, General/Other Hospice Care

### **Program Linked to Organizational Strategy**

Yes

### **Population Served**

Children and Youth (0 - 19 years) Families

### **Short Term Success**

Aggressive medical procedures, which can be a source of discomfort for young patient, often are minimized once in Tidewell care. A child life specialist helps the child relax during the procedure through the use of various techniques and therapies. Music therapy matches music to the heartbeat at the time of a crisis, gradually modifying the music to achieve the desired heartbeat. Children learn to help themselves relieve their own suffering. The child life specialist also works with patients' parents and siblings to understand the illness, what to expect during treatments while preparing them for the impending death through expressive arts therapy (legacy building and memory making projects). Through medical play, children learn how to use medical equipment on medical dolls, preparing themselves for the procedures they will soon receive. Tidewell also works with the families of adult hospice patients who have young children, providing spiritual and practical support.

### **Long Term Success**

Children diagnosed with life limiting, incurable illnesses will receive compassionate care, comfort and emotional support from Tidewell Hospice Children's Services' care team while they continue receiving curative treatment throughout their final phase of life. Developmentally appropriate, customized care plans are developed to meet the needs of each child and family. Programs and services have expanded in response to patients and families' needs, introducing complementary services such as music therapy, expressive arts, medical play, tactile stimulation and other memory-making activities, as well as essential respite care visits. Care teams bring comfort and foster quality of life, helping kids be kids instead of patients. Children and their loved ones are able to make the most of their time together. That is the goal for care teams, who are experts in pediatric hospice and palliative care.

**Program Success Monitoring**

Formal patient chart audits, family satisfaction surveys, and interdisciplinary collaboration for adaptable care plans are completed monthly to assess effectiveness of services on a case-by-case basis. Modification needs are evaluated and implemented and program success is closely monitored by internal and external systems.

**Program Success Examples**

C.N. is a four-year-old boy whose life changed dramatically last year, in an instant, when he fell into the family swimming pool. His non-fatal drowning resulted in anoxic brain injury (lack of oxygen to the brain), leaving him severely disabled. Respite visits are essential. "It's such a relief to have caregivers I trust come in and take care of C.N. for a little while so I can spend some time with the other boys and with their dad – just being 'regular people' in a family," said A.N., mother of C.N. Music Therapy is used to comfort and redirect C.N.'s attention to the sound of guitar and singing. The Child Life Specialist visits provide vital support to C.N.'s siblings, parents and grandparents, who struggle with the shocking change from the energetic little boy C.N. was before the accident. "What happened to us can happen to anybody," said A.N. "We are so blessed to have this support from Tidewell."



## COMPLEMENTARY SERVICES

<b>Description</b>	<p>Tidewell's Complementary Services offers quality-of-life programs to people with advanced illness and their families. Used with conventional medicine, complementary therapies boost pain relief, reduce anxiety and isolation, redirect focus to positive endeavors, stir conversations, increase sense of well-being and restore hope – optimizing quality of life by helping patients and loved ones maximize their time together.</p> <p>Complementary Services include Expressive Arts, Shared Music, Pet Therapy, Life Legacy Keepsakes, Veterans Projects, Massage Therapy, Horticultural Interventions, Humor and Clowning, Aromatherapy, Reiki and Caring Touch. The need for compassionate end-of-life care grows while funding shrinks. This program is funded by donations, competing with many other agencies for diminishing funds. Good stewardship options are always employed while sustaining the hospice mission to serve our community.</p>
<b>Budget</b>	\$376,000.00
<b>Category</b>	Health Care, General/Other Hospice Care
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	General/Unspecified
<b>Short Term Success</b>	<p>Successes are evident in the increased comfort patients report from diverting attention from pain and symptoms, and redirecting their focus into creativity and positive interactions. In conversations and survey responses, patients attest to easing pain and distressing symptoms by working on an art project or listening to music with their volunteers. During her long term care facility patient visits, a pet therapy volunteer stated "My therapy dog, Max, and I visited a man with Alzheimer's who was not very responsive. When he ran his hands through Max's coat, he never stopped smiling the entire visit. This attracted the attention of other nursing home patients who came over to pet Max too. Therapy pets are a blessing when conventional methods of communication may fail." From a patient to a Massage Therapist, "Thank you for sharing your tender touch, your caring hands and professional massage. It is truly stimulating. I feel pain relief almost immediately!".</p>
<b>Long Term Success</b>	<p>Complementary Services has been part of Tidewell Hospice's services since 1994. Our specialized therapies have brought positive diversions and shared joy among patients and their loved ones. Most program visits are provided by volunteers, however, some Horticultural Therapists, Expressive Arts Facilitators and Licensed Massage Therapists are Tidewell staff or contracted professionals. Among Tidewell's 1,100 trained volunteers, there is a wealth of experience and a world of compassion that is shared with our patients and families. Many volunteers have had a personal hospice experience and want to give back. The Complementary Services Department relies on charitable contributions to continue providing the highest quality care for patients and families. The number of staff and volunteer visits has remained stable for some complementary therapies and increased for others, based on care teams' referrals.</p>

## **Program Success Monitoring**

Program success is monitored by monthly and annual reports of patients served. The *Family Evaluation of Hospice Care* survey asks measures the quality of care received from the perspective of family members. Patient charts are reviewed during care teams' IDG meetings to evaluate successes and address any need for improvement. Letters and testimonials from patients and families along with feedback from staff and volunteers all document the program's effectiveness. Budget information is monitored monthly with reports to the Executive Team. Often, the seven Hospice House gardens are praised in family satisfaction surveys. Horticultural Therapists maintain rose, herb and butterfly gardens to stimulate the senses and offer an outside change of scenery for visitors and patients. Herbal and floral arrangements are made for patients by volunteers and horticultural therapists. They work together to keep the gardens groomed and healthy for patients, families and visitors.

## **Program Success Examples**

*The Family Evaluation of Hospice Care is a survey designed to assess patient/family experience with the quality of the hospice care they received. Data is compiled and compared to state wide results, agencies with similar census, and those in the same sector. Tidewell has achieved a five star rating on all five dimensions of the survey, exceeding average survey results relative to other providers in the nation. Below is a story from our Expressive Arts Facilitator, which illustrates the impact of the Complementary Services provided by Tidewell: "I made a hand sculpture for a dying mother and her young son. Since her death, I've seen the little boy, and he's told me how much it means to him to be able to still hold his mother's hand by placing his hand on the sculpture. Each project is developed based on the energy level of the patient, how much time we have together and what is most important to the patient to express. It is the power of saying good-bye."*

## Tidewell Honors

<b>Description</b>	<p>Tidewell is honored to provide services for thousands of military veterans. Since 1980, Tidewell Honors has provided a peaceful end-of-life experience while honoring veterans' contribution to America's freedom. In addition to expertise in caring for people with advanced illnesses, Tidewell's care teams undergo specific training to identify and address the unique needs of veterans and their families.</p> <p>The Tidewell Honors ceremony recognizes veterans with a certificate of appreciation and a Tidewell Honors pin, presented by a former service member trained as a Tidewell Veteran Volunteer.</p> <p>An integral part of Tidewell Honors is leaving a legacy. Using the Library of Congress' Veterans History Project as a guide, Tidewell staff and volunteers encourage veterans to create a legacy by sharing their stories. Tidewell Honors also provides care for veterans' families. Special grief support groups allow loved ones and caregivers to share their experiences in a safe environment and connect with others dealing with similar circumstances.</p>
<b>Budget</b>	\$5,215.00
<b>Category</b>	Health Care, General/Other Hospice Care
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	Adults
<b>Short Term Success</b>	<p>In collaboration with the Department of Veterans Affairs and the National Hospice and Palliative Care Organization (NHPCO), Tidewell has been named a Level-4 partner in NHPCO's "We Honor Veterans" program – the highest status achievable.</p> <p>NHPCO recognized Tidewell Hospice on its website for <i>Best Practices</i> regarding staff and volunteer education/orientation programs and for Veteran-Hospice partnership activities.</p>
<b>Long Term Success</b>	<p>Since 2008, <b><i>Tidewell Honors</i></b> has served more than 13,000 patients who are military veterans. With more than 104,000 military veterans living in the four-county community, Tidewell remains committed to providing the best possible care for veterans nearing the end of life.</p> <p>No fees are charged for <i>Tidewell Honors</i>. The comprehensive program demonstrates appreciation for veterans' service and sacrifice at home and abroad. Tidewell's care teams are trained to identify and address signs of concerns specific to veterans and military families. Tidewell Honors is well known, locally and nationally, for its dedication to optimal care and emotional support for veterans.</p>
<b>Program Success Monitoring</b>	<p>Weekly, monthly and quarterly reports are analyzed to ensure the program's effectiveness. Monthly reports are provided by the program director to Tidewell's Executive Team and Board of Trustees.</p> <p>Written and verbal communications are received from patient/family/ community testimonials praising the program and citing specific activities, such as the pinning ceremonies, Legacy projects and participation in veteran events throughout the community.</p>

## **Program Success Examples**

More than 30 Veteran Legacy projects have been completed, helping veterans find meaning in a life lived well, chronicling memories to share with future generations and resolving conflicts that may block a peaceful end-of-life experience.

Each experience is unique, as the following letter from a patient's son to a Tidewell volunteer attests:

"I know my Dad was thrilled that you came over and acknowledged his service with a special veteran's pinning. It was a special treat for him and maybe a greater treat for me. I learned more than I ever have about his military service because he opened up to us during the pinning ceremony. (A)ll of you at Tidewell are special. Thanks for everything you are doing."

## Grief Education & Support Services

<b>Description</b>	<p>Tidewell provides individual and group grief counseling as a community service to anyone who has lost a loved one, regardless of whether or not that person received Tidewell hospice care. No other agency provides this service. The program is totally free of charge and is funded entirely through philanthropic support.</p> <p>Many of Tidewell's bereavement clients have experienced what is referred to as "traumatic" grief. These losses may be the result of suicide, overdose, accident or a sudden illness. Individuals suffering from complex grief experience difficulty with normal activities such as eating, sleeping, tending to their children or getting to work. Left unchecked, these symptoms may lead to destructive behaviors.</p> <p>Requests for grief counselors come from various sources, including schools, social service agencies, parents and/or area hospitals. Tidewell collaborates with neonatal, obstetric and other specialists to support families with a wide range of services.</p>
<b>Budget</b>	\$1,117,173.00
<b>Category</b>	Health Care, General/Other Hospice Care
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	General/Unspecified General/Unspecified General/Unspecified
<b>Short Term Success</b>	<p>Recognizing that prevention is preferable to treatment, the aim is to provide each individual with the tools they need to address the unhealthy symptoms and complicated emotions associated with loss. Often the first major achievement is realizing that they are not alone and that help and support are available. The counselors assist the individual in identifying their long term and short term goals. Short-term success for a child may be overcoming the fear that his surviving parent will not also suddenly disappear. For the parent who recently lost their spouse and is suddenly the sole income earner and care-provider, short-term success may be recognizing that their emotional rollercoaster is normal and better understanding how to comfort their children.</p> <p>Tidewell's grief counselors utilize developmentally appropriate techniques to help the individual reach these goals. Often, with hospice patients and their families, this may take the form of anticipatory grief counseling.</p>
<b>Long Term Success</b>	<p>The goal is to provide effective coping tools before behaviors become destructive, allowing individuals to grieve in a way that promotes wholeness and closure. The counselor remains with the individual or family for as long as their services are requested. The target is to help turn tragedy into strength and obstacles into triumph.</p> <p>Tidewell works with the client's "team" to identify the problem indicators, set goals and build the skills to cope and grow. The team may include parents, siblings or others. Outcomes depend on the difficulties experienced by each person and may include the ability to ask for and give help; improved grades or work performance; reduction or elimination of self-destructive behaviors; and emotional stability.</p> <p>A father expressed his gratitude for the impact on his son. "His grades have improved. His involvement at home and our relationship has improved. He knows there are people his own age he can talk to and that he doesn't have to mourn consistently."</p>

### **Program Success Monitoring**

Group sessions typically revolve around a specific topic such as “What are normal responses to grief,” “Symptoms of grief,” or “How to build support networks.” These sessions are self-reporting. By each participant reporting on their accomplishments or set-backs, the groups better understand that grieving is a process with good days and bad. During individual sessions the grief counselors work with the adults to identify their dysfunction and develop coping skills. Indicators of improvement may be a return to work or eating and sleeping more healthfully.

Through family sessions parents are guided in techniques to help their child address their fears. Parents are taught that children grieve differently than adults and younger children grieve differently than their older siblings. Children learn to ask for help as well as give it. The entire family benefits from sharing their emotions with peers who have also experienced a loss and with other family member.

### **Program Success Examples**

In the last year, Tidewell’s Grief Education and Support Services served 12,019 people: 6,231 in Sarasota, 4,103 in Manatee; 1,633 in Charlotte and 52 in DeSoto Counties. Tidewell recently contracted with a Spanish-speaking grief counselor in response to requests from schools, hospitals and social service agencies and introduced a Grief Call Center in response to the high volume of community requests for support. The center is available 24-7 and receives an average of 165 calls each month. A Grief Mentoring program in Sarasota schools pairs teenagers in grief counseling with younger children. Through journaling and art these children share their personal journey through loss with one another. One example: Kenny, age 11, whose father committed suicide, was paired with Marissa, a 16-year-old with a mother who died from her drug addiction. Marissa sent letters and pictures to Kenny sharing her feelings and offering him support. Kenny in turn responded to Marissa’s words and drawings.

## Transitions

<b>Description</b>	Transitions is an end-of-life program offered by Tidewell to people who have been diagnosed with an advanced illness and have a prognosis or life expectancy of one year or less. Transitions is designed to provide the non-medical support and practical assistance needed to ease the stress and burden individuals may feel as a result of their diagnosis and other health limitations. Transitions staff meet with clients and their families to assess needs, provide information about available community resources, coordinate needed services, and provide emotional support for decision-making. Specially trained Transitions volunteers are assigned to each client to provide companionship, friendship and respite for their families. Volunteers also help with transportation, errands, food preparation, and more. This program is not funded by Medicare or third-party payers and all services are provided at no charge to the client or family.
<b>Budget</b>	\$199,759.00
<b>Category</b>	Human Services, General/Other In-Home Assistance
<b>Program Linked to Organizational Strategy</b>	Yes
<b>Population Served</b>	Aging, Elderly, Senior Citizens Aging, Elderly, Senior Citizens Aging, Elderly, Senior Citizens
<b>Short Term Success</b>	Tidewell's Transitions Client Coordinators educate our community about the program and also provide a vast list of local and online resources to further assist with any unmet needs. Our team have won numerous Tidewell Angel awards from grateful clients and families who made a difference while their loved one was in our program's care.
<b>Long Term Success</b>	<p>The program receives more than 460 referrals annually- an increase of 15% over previous year. The program has realized a 13% increase in admissions from the previous year, at 307 annually. 283 Transition client support volunteers made 4,215 visits in 2016.</p> <p>The program continues to grow through the recruitment of new volunteers (10+ orientation sessions throughout the service area annually) and the enhancement of volunteer knowledge through ongoing training sessions. Transitions staff and volunteers receive ongoing instruction regarding Dementia and Alzheimer's Disease, the art of caregiving and caring for the elderly.</p> <p>Transitions staff organized and conducted the first state-wide Transitions Networking Group meeting with hospices across the state.</p>
<b>Program Success Monitoring</b>	<p>The Transitions department conducts an annual client and family program satisfaction survey each November. This past year, 100% satisfaction was reported with participants. On a score of 1 (worst or lowest rating) to 5 (best or highest value), the program's overall score was 5.</p> <p>Data is collected regarding the number of clients served by Transitions, those who were later admitted to hospice, volunteer hours and site visits and several other quality indicators.</p>

## **Program Success Examples**

Transitions admitted a 96 year old woman who suffered some medical setbacks, failing health and some mental decline. Her daughter and husband moved to live with her from their home on the west coast to allow Mom to stay at her home that she loved for many years. She has a lovely volunteer who provides friendship and weekly respite for her daughter. They developed quite a friendship, took walks in the neighborhood and played cards. Our Transitions client was admitted into hospice on Oct 11th and her family is so appreciative that she can continue to stay at her beloved home and that her volunteer can continue to visit.

From a grateful son- "Thanks so very much for the care and support provided in our journey with my father-in-law. From the beginning with our Transitions Coordinator & volunteer and ending with our hospice home team along with the folks at Lakewood Ranch Hospital, everyone really helped to make Dad's end of life better/easier. Thanks so much for all you do."



# MANAGEMENT

## CEO/Executive Director

<b>CEO/Executive Director</b>	Gerry Radford, ACHE
<b>CEO Term Start</b>	Aug 2010
<b>CEO Email</b>	gradford@tidewell.org

### Experience

Gerry Radford has been with Tidewell Hospice for 18 years. He was named President and Chief Executive Officer in August 2010. A native of Massachusetts, Radford has more than 30 years of health care administration experience. He graduated from the University of Massachusetts in Boston and, prior to joining Tidewell, worked as an administrator at Massachusetts General Hospital, Tufts New England Hospital and New England Deaconess Association and Integrated Health Systems. In 2009, he attained the prestigious Certified Hospice Executive (ACHE) credential, recognized as the highest level of achievement in hospice administration.

## Senior Staff

Saida Bouhamid  
EVP/Chief Operating and Financial Officer

Mary Heath, RN, BS, CPHQ  
EVP/Chief Nursing Officer

David Lafferty, CPHIMS, CHCIO, ACHE  
EVP/Chief Information Officer

Theresa Nolan  
EVP/Compliance and Quality

Denise Pope, CFRE  
EVP/Chief Philanthropy Officer

Neville Sarkari, MD, FACP  
EVP/Chief Medical Officer

Julie Schilson, SPHR, SHRM-SCP  
EVP/Chief Human Resources Officer

## Staff & Volunteer Statistics

<b>Full Time Staff</b>	567
<b>Part Time Staff</b>	147
<b>Staff Retention Rate %</b>	80
<b>Professional Development</b>	Yes
<b>Contractors</b>	4
<b>Volunteers</b>	1002
<b>Management Reports to Board</b>	Yes
<b>CEO/Executive Director Formal Evaluation</b>	Yes
<b>Senior Management Formal Evaluation</b>	Yes
<b>NonManagement Formal Evaluation</b>	Yes

## Collaborations

Collaboration with Children's Medical Services and its Partners-In-Care Together for Kids (PIC) program, All Children's Hospital, schools, community physicians, hospitals, assisted living and long term care facilities, and churches.

# GOVERNANCE

## Board Chair

<b>Board Chair</b>	Michael Uselton
<b>Company Affiliation</b>	Owner/Managing Member, Kays Ponger Uselton/Remembrance Services
<b>Board Term</b>	Sept 2016 to Aug 2017
<b>Board Chair Email</b>	muselton@kays-ponger.com

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Kimberlie Buchanan	-	Voting
Debra S. Clark	Bayfront Health Port Charlotte	Voting
Renee Eppard	-	Voting
Steve Hall	Alltrust Insurance	Voting
Violeta Huesman	Keiser University-Sarasota	Voting
Sheryl L. Kaiser	Retired Assistant Superintendent	Voting
Eric Lubiner DO	Florida Cancer Specialists	Voting
Angela Massaro-Fain	Grapevine Communications	Voting
A. Jill McCrory	Lawyer	Voting
Jan Miller	Caldwell Trust Company	Voting
Gerald D. Radford ACHE	Tidewell Hospice	Voting
Jim Roque	Banking Professional	Voting
Steven Roskamp	Freedom Senior Management	
Reverend Arthur B. Schute	Retired Clergy	Voting
Thomas Stuhley	Retired banker	Voting
Michael Uselton, CCFE	Businessman; Kays Ponger Uselton Remembrance Services	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	0
<b>Caucasian</b>	16
<b>Hispanic/Latino</b>	0
<b>Native American/American Indian</b>	0
<b>Other</b>	0 0

## Board Demographics - Gender

<b>Male</b>	8
<b>Female</b>	8
<b>Not Specified</b>	0

## Governance

<b>Board Term Lengths</b>	2
<b>Board Term Limits</b>	3
<b>Board Orientation</b>	Yes
<b>Number of Full Board Meetings Annually</b>	6
<b>Board Meeting Attendance %</b>	76
<b>Board Self-Evaluation</b>	Yes
<b>Written Board Selection Criteria</b>	No
<b>Percentage of Board Making Monetary Contributions</b>	100
<b>Percentage of Board Making In-Kind Contributions</b>	0
<b>Constituency Includes Client Representation</b>	

## Standing Committees

Audit

Building

By-laws

Development / Fund Development / Fund Raising / Grant Writing / Major Gifts

Nominating

Personnel

Finance

Audit, Compliance and Controls

Executive

# FINANCIALS

## Current Financial Info

<b>Fiscal Year Begins</b>	2016
<b>Fiscal Year Ends</b>	2017
<b>Projected Revenue</b>	\$88,950,000.00
<b>Projected Expenses</b>	\$84,880,000.00
<b>Total Projected Revenue includes "in-kind" contributions/ donations</b>	
<b>Endowment Value</b>	\$6,533,112.00
<b>Spending Policy</b>	Percentage
<b>Spending Policy Percentage</b>	4
<b>Tax Credits</b>	No

## Capital Campaign

<b>In a Capital Campaign</b>	No
<b>Campaign Goal</b>	0
<b>Anticipate Campaign Within Next 5 Years?</b>	No

## IRS Form 990s

990

990

Form 990

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## Audit/Financial Documents

Tidewell Audit

Tidewell Audit

Tidewell Audit

Tidewell Audit

Tidewell Audit

Tidewell Audit

Tidewell Audit

Tidewell Audit

Tidewell Audit

## Solvency

### Short Term Solvency

Fiscal Year	2016	2015	2014
Current Ratio: Current Assets/Current Liabilities	2.54	12.33	12.91

### Long Term Solvency

Fiscal Year	2016	2015	2014
Long-Term Liabilities/Total Assets	0%	0%	0%

## Historical Financial Review

### Revenue and Expenses

Fiscal Year	2016	2015	2014
Total Revenue	\$88,069,013	\$95,363,921	\$90,904,583
Total Expenses	\$83,211,874	\$83,235,327	\$81,415,130

### Revenue Sources

Fiscal Year	2016	2015	2014
Foundation and Corporation Contributions	\$0	\$0	\$0
Government Contributions	\$0	\$0	\$0
Federal	\$0	\$0	\$0
State	\$0	\$0	\$0
Local	\$0	\$0	\$0
Unspecified	\$0	\$0	\$0
Individual Contributions	\$4,321,024	\$5,929,750	\$3,874,181
Indirect Public Support	\$0	\$0	\$0
Earned Revenue	\$83,223,096	\$85,670,884	\$83,158,445
Investment Income, Net of Losses	\$416,509	\$3,107,364	\$3,334,205
Membership Dues	\$0	\$0	\$0
Special Events	\$74,829	\$72,466	\$50,209
Revenue In-Kind	\$67,499	\$67,499	\$67,499
Other	\$33,555	\$583,457	\$487,543

### Expense Allocation

Fiscal Year	2016	2015	2014
Program Expense	\$73,425,749	\$72,404,587	\$70,374,750
Administration Expense	\$8,661,478	\$9,963,823	\$10,132,725
Fundraising Expense	\$1,124,647	\$866,917	\$907,655
Payments to Affiliates	\$0	\$0	\$0
Total Revenue/Total Expenses	1.06	1.15	1.12
Program Expense/Total Expenses	88%	87%	86%
Fundraising Expense/Contributed Revenue	26%	14%	23%

### Assets and Liabilities

Fiscal Year	2016	2015	2014
Total Assets	\$33,274,068	\$160,334,711	\$148,831,068
Current Assets	\$24,892,538	\$114,496,754	\$105,851,952
Long-Term Liabilities	\$0	\$0	\$0
Current Liabilities	\$9,811,234	\$9,284,382	\$8,196,799
Total Net Assets	\$23,462,834	\$151,050,329	\$140,634,269

### Top Funding Sources

<b>Fiscal Year</b>	<b>2016</b>	<b>2015</b>	<b>2014</b>
<b>Top Funding Source &amp; Dollar Amount</b>	Medicare/Medicaid Payments \$80,272,018	Medicare/Medicaid \$80,923,593	Medicare/Medicaid \$78,360,458
<b>Second Highest Funding Source &amp; Dollar Amount</b>	Contributions, gifts, grants \$4,321,024	Contributions, gifts, grants \$5,929,750	Contributions, gifts, grants \$3,874,181
<b>Third Highest Funding Source &amp; Dollar Amount</b>	Private Insurance \$2,727,873	Investment Income \$3,107,364	Investment Income \$3,334,205

## Comments

### **Financial Comments by Foundation**

Financial figures taken from IRS Form 990s. Foundation, corporations and congregations are included with individual contributions as they were not separated in the 990. The in-kind contribution revenue includes non-cash contributions and donated services and use of facilities as reported on the IRS Form 990. Donated services and facilities are not included in total revenue on the IRS Form 990. 990s and audits reconcile. During 2016, Tidewell Hospice transferred assets totaling \$131,846,166 to Stratum and Tidewell Real Estate as part of a restructure, creating new related companies.

# PLANS, POLICIES & LICENSES

## Plans

<b>Fundraising Plan</b>	Yes
<b>Communication Plan</b>	No
<b>Strategic Plan</b>	No
<b>Strategic Plan Adopted</b>	May 2012
<b>Years Strategic Plan Considers</b>	3
<b>Management Succession Plan</b>	No
<b>Continuity of Operations Plan</b>	Yes

## Policies

<b>Organizational Policies and Procedures</b>	No
<b>Written Conflict of Interest Policy</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Directors and Officers Insurance Policy</b>	No
<b>Whistle Blower Policy</b>	Yes
<b>Document Destruction Policy</b>	Yes

## Awards & Recognition

<b>Award/Recognition</b>	<b>Organization</b>	<b>Year</b>
We Honor Veterans Partner Level 4, highest recognition of exciting program	National Hospice and Palliative Care Organization's (NHPCO)	2012

## Government Licenses

**Is your organization licensed by the Government?** Yes