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Nonprofit portrait provided by The Community Foundation Serving Richmond & Central Virginia

## Circle Center Adult Day Services



### General Information

#### Contact Information

<b>Nonprofit</b>	Circle Center Adult Day Services
<b>Address</b>	4900 W. Marshall Street Richmond, VA 23230
<b>Phone</b>	804 355-5717
<b>Fax</b>	804 358-3866
<b>Web Site</b>	<a href="http://www.circlecenterads.org">www.circlecenterads.org</a>
<b>Facebook</b>	<a href="https://facebook.com/CircleCenter">facebook.com/CircleCenter</a>
<b>Twitter</b>	@CircleCenterADS

#### At A Glance

<b>Year of Incorporation</b>	1978
<b>Former Names</b>	Stuart Circle Center, Inc.
<b>Organization's type of tax exempt status</b>	Public Supported Charity

# Statements & Search Criteria

## **Mission**

The mission of Circle Center Adult Day Services is to provide comprehensive and individualized quality care for older adults during the day, enabling them to live at home and providing assurance and respite for family caregivers.

## **Background**

Circle Center Adult Day Services has been providing licensed adult day services for older adults and their family caregivers living throughout the Greater Richmond area since May 1, 1976. The non-sectarian Center was founded by an ecumenical group of five Fan District churches and was housed in the Fan until 1986, then on the campus of another human service organization until January 2009 when it moved to its current location at 4900 West Marshall, near Willow Lawn.

Circle Center serves a diverse population of older adults ranging in age from 55-100+ and representing varied socioeconomic levels. Currently, 100% of those served are already nursing home eligible yet live at home with relatives, receiving care at the Center 2-6 days a week. Their family caregivers are primarily adult children and spouses or other close relatives, 70% of them employed. Families use Circle Center as a source of care for their loved one and as a way of maintaining their own work role, and/or as source of support and respite from the 24/7 demands of caregiving.

Circle Center provides a variety of services, based on the assessed needs of each person. Services include daily nursing (RN) care, social work services, emotional and cognitive support, a unique Montessori-based program for those with dementia, a wellness program in dedicated space (including strength, balance, flexibility training, cognitive and physical games), arts and crafts, as well as a music program run by a music therapist. Also provided are: breakfast, lunch and snacks. Help with personal care including showers, support groups, educational seminars and counseling for caregivers, caregiver respite and coordination of transportation are available.

Helping these older adults continue to live at home longer not only allows them to age in place with their families, but is also a very cost effective option for families and for taxpayers. For those served at Circle Center in 2015-16 the cost-savings was projected to be over \$7 million dollars. Similar results are anticipated for 2016-17. The increasing emphasis on community and managed care alternatives is expected to accelerate in coming decades as the age wave creates unprecedented need for services. Circle Center is widely regarded as a leader in eldercare in the region.

## Impact

Under the direction of the new CEO, the Center's 2015-16 achievements included:

- Opening of the newly renovated 5,100 sf of space
- Census increased 16% from July 2015-June 2016; with an average of 88 participants per day; overall, served 200 participants
- Staff grew with addition of: 1 RN, 1 Social Worker, 1 Music Therapist; providing more support, coverage and opportunities for our participants
- Annual Survey of family caregivers results: 96% reported the Center helped them cope; 96% said the Center met their needs for help with caregiving; 96% reported use of the Center's support and educational resources; 96% reported the Center helped them maintain valued life roles such as worker, caregiver, volunteer and/or member of a faith community
- 98% of those employed reported Circle Center services helped them maintain their job

2016-2017 Goals include:

- Delay or prevent nursing home placement by keeping families together
- Support continued community living
- Maintain or improve participant's functional abilities and copying skills, and
- Improve the quality of family life
- Additional goal is to increase daily census to 100 participants.

## Needs

1. Needs-Based Scholarship program requires support in order to assist participants and potential participants who demonstrate financial need.
2. Continue to prepare for coming changes in health care including participation in managed care and Affordable Care Act programs in area hospital systems.
3. Continue to strengthen Resource Development and Marketing activities including with additional skilled volunteers to grow non-fee income and census.
4. Now that physical expansion is complete, need is to continue census growth to maximize the updated space.
5. Volunteers at the Center are needed for a variety of activities and program support in order to help keep participants engaged as well as providing office support.

## CEO/Executive Director Statement

It is a myth that most impaired older adults are in institutional/residential care. In reality, 80% of all eldercare is provided by families in their homes. For each person in a nursing home there are four who are equally impaired living at home, in neighborhoods all around the community. Nine of ten (9/10) Boomers say they want to age in place at home and Circle Center is well positioned to meet their needs in coming decades. Already the Center is a pioneer and leader in community-based eldercare with a long-established program that substantially exceeds licensing requirements, a highly qualified staff, six-day-a-week program for continuity of care and to support working caregivers, a state-of-the-art facility with a recently expanded footprint to almost double service capacity as demand increases in coming decades. Additionally, the Center has an active student intern program to help build service capacity in future decades. The agency has a long history of demonstrated cost-effectiveness. As the Chief Executive Officer at Circle Center, I intend to honor that history and look forward to meeting the challenges of the future of healthcare and its impact on the elderly population.

## **Board Chair Statement**

As its names suggests, Circle Center was founded by several churches in the area surrounding Stuart Circle in the Fan. The Center has enjoyed strong support over the decades from its founding churches, including St. James's Episcopal Church, where I am a member. I followed a retiring assistant rector of St. James's as the church's representative on the Circle Center Board. I was drawn to Circle Center and its mission because I had recently witnessed the tireless efforts of my parents to help my grandmother remain in her home after suffering a stroke. That experience opened my eyes to the complexity of eldercare, and the clear need for adult daycare and respite.

One of Circle Center's ongoing successes has been a diverse and active Board of Directors. Indeed, many Board members continue to support the Center long after their tenures expire. This past year as Board Chair, I oversaw the transition of leadership from our CEO of over 35 years to our current CEO, Amy Bodman. Amy served as a Board member and then joined the Center staff as Chief Operating Officer for roughly a year, as she prepared for her new role as CEO. Thanks to the support and guidance of our Board, the transition has been smooth.

Our most exciting challenge this past year has been the opening of our newly renovated wing allowing us to increase our licensing capacity from 85 to 130 participants. This growth in physical space has brought about the need to increase our census, bring on new staff to accommodate the growing number of participants, increase programming in multiple locations, and, most of all keep all of the pieces running smoothly with as little disruption to our participants as possible. I am delighted to report that in this first year of multiple transitions, Circle Center was able to end the year on sound financial footing. We are proud of our building, staff and facilities and work to preserve and support these areas.

Circle Center will continue to meet the challenges of an aging and growing population, along with their financial needs. In an effort to serve older adults throughout the Richmond area regardless of their ability to pay, we face the challenge of Medicaid's allotment falling below the cost of providing our service. We are active in our pursuit of grants from community funders, as well as individual donors.

## **Areas Of Service**

### **Areas Served**

#### **Areas**

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Richmond, City  
Chester  
Chesterfield County  
Goochland County  
Hanover County  
Henrico County  
Powhatan County  
Charles City County  
Louisa County  
New Kent County

Circle Center serves older adults from all areas of the planning district. There is no set boundary. The only limits are the availability of transportation and the program participant's endurance for travel to services provided.

## Service Categories

Patient & Family Support

Rehabilitative Care

Health Support

# Programs

## Programs

### Adult day health care

**Description**

Adult day health care is the core service provided by Circle Center according to licensing standards of the Virginia Department of Social Services. The Center has a three year (maximum) license for substantially exceeding the standards. The Center is also a Medicaid-certified adult day health care center, meeting standards of the Virginia Department of Medical Assistance Services. The six-day-a-week program at Circle Center provides a variety of services, based on the assessed needs of each person. Services include a written individualized care plan, daily nursing (RN) care, social work services, emotional and cognitive support, a unique Montessori-based program for those with dementia, a multisensory environment, a wellness program in dedicated space (including strength, balance, flexibility training), cognitive and physical games, arts and crafts, music programs led by a Music Therapist. Also, included is breakfast, lunch and two snacks, help with personal care including showers, support groups for participants and caregivers, educational seminars and counseling for caregivers, caregiver respite and coordination of transportation.

**Budget**

\$0.00

**Long term Success**

High risk older adults, already eligible for nursing home placement, will continue to live at home, supported by their families and Circle Center services, delaying or preventing placement in residential care as long as possible. Success is measured by number of days remaining at home and cost savings.

**Short Term Success**

Program participants will have a written, individualized care plan so they receive the care and support they need to maintain the skills, abilities and endurance needed to attend as scheduled. Changes in condition will be quickly identified so problems can be addressed and crises prevented. Family caregivers will receive the respite, education and support they need to continue in the caregiver role.

# Board & Governance

## Board Chair

<b>Board Chair</b>	Paula Desel
<b>Company Affiliation</b>	Altria
<b>Term</b>	July 2017 to June 2019
<b>Email</b>	deselpa@gmail.com

## Board Co-Chair

<b>Board CoChair</b>	Beth Ludden
<b>Company Affiliation</b>	Genworth
<b>Term</b>	July 2017 to June 2019
<b>Email</b>	beth.ludden@genworth.com

## Board Members

<b>Name</b>	<b>Affiliation</b>	<b>Status</b>
Hector Alonso	Retired	Voting
Marshall Bigelow	UPS Freight	Voting
Alex DerHovhannessian	Advantage Global Solutions	Voting
Paula Desel	Altria	Voting
Shane Finnegan	Gumenick Properties	Voting
Christine Hagan	Retired	Voting
Emmett R. Heltzel	VA Dept. of Transportation	Voting
Hart Lee	Williams Mullen	Voting
Beth Ludden	Genworth	Voting
Jay Lugar	Massey Cancer Center	Voting
Chris Lumpkin	Union First Market Bank	Voting
Mary Ann Mugel	Bon Secours Health System	Voting
Mark Railsback	Genworth Financial	Voting
Andrew P. Sherrod	Hirschlor Fleischer, PC	Voting

## Board Demographics - Ethnicity

<b>African American/Black</b>	0
<b>Asian American/Pacific Islander</b>	1
<b>Caucasian</b>	12
<b>Hispanic/Latino</b>	1
<b>Native American/American Indian</b>	0
<b>Other</b>	1

## Board Demographics - Gender

<b>Male</b>	10
<b>Female</b>	4
<b>Unspecified</b>	0

## Governance

<b>Board Term Lengths</b>	2
<b>Board Term Limits</b>	3
<b>Board Meeting Attendance %</b>	80
<b>Written Board Selection Criteria?</b>	Yes
<b>Written Conflict of Interest Policy?</b>	Yes
<b>Percentage Making Monetary Contributions</b>	100
<b>Percentage Making In-Kind Contributions</b>	100
<b>Number of Full Board Meetings Annually</b>	6

## Standing Committees

Board Governance

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

Executive

Finance

Marketing

Building

## Comments

Ideally, the Center Board would have a constituent representative and at times it does. However, given that those we serve can usually never be left alone, 70% of their family caregivers also work and the Board meets after center operating hours to provide maximal access to a diverse membership, there are periods of time when we have no caregiver with the time, energy and resources to also serve on the Board. In addition, most of those caregivers are also elderly themselves or in their 50's-60's and have limits on their ability to do even more than they already do. We do however, see many family members daily as they transport relatives and we encourage feedback that informs the board and staff for governance decisions.



# Management

## Executive Director/CEO

<b>Executive Director</b>	Mrs. Amy C. Bodman
<b>Term Start</b>	May 2015
<b>Email</b>	abodman@circlecenterads.org

### Experience

Amy C. Bodman, previously the Chief Operating Officer at Circle Center, has 24 years of health care management experience in varied acute and long term care settings. She received a BS in Occupational Therapy from Keuka College and earned an MBA from Virginia Commonwealth University in 2011. She is a licensed occupational therapist. Her experience in the rehabilitation and community-based long term care industry helps further develop and maintain our award-winning participant programs and services as well as address the increasing regulatory demands that our industry faces. Amy is a respected and caring practitioner who is well qualified to provide continuing leadership for the care that our talented staff members provide every day for our participants and their families.

## Co-CEO

### Experience

## Former CEOs

<b>Name</b>	<b>Term</b>
Lory L. Phillippo	Jan 1980 - May 2015

## Senior Staff

<b>Name</b>	<b>Title</b>
Mary Branzelle	Program Director
Jay Burkhardt	Social Worker
Erin Burnette	Social Worker
Stefani King	Accountant
Lisa Pacelli	Operations Manager
Sheila Selznick	Participant Care Coordinator
Casey Warren	RN

## Staff

<b>Full Time Staff</b>	33
<b>Part Time Staff</b>	12
<b>Volunteers</b>	350
<b>Contractors</b>	0

**Retention Rate** 0

## Plans

<b>Organization has a Fundraising Plan?</b>	Yes
<b>Organization has a Strategic Plan?</b>	Yes
<b>Years Strategic Plan Considers</b>	3
<b>Date Strategic Plan Adopted</b>	May 2011
<b>Management Succession Plan?</b>	Yes
<b>Organization Policy and Procedures</b>	Yes
<b>Nondiscrimination Policy</b>	Yes
<b>Whistleblower Policy</b>	Yes
<b>Document Destruction Policy</b>	No
<b>Directors and Officers Insurance Policy</b>	Yes

## Collaborations

Community partners:

- Specialized Transportation Providers: coordinate transportation for participants with 10-12 providers/day; provides business for community, avoids duplication and expense
- VCU/MCV Departments of Occupational Therapy, Social Work, occasionally Nursing: supervised internships for university credit. Three Center staff have adjunct faculty appointments at instructor and assistant professor levels; ongoing best practices research by OT graduate students
- James Madison University, University of Tennessee, University of Richmond: Student interns in occupational therapy, psychology and related health professions
- Senior Connections: CCADS provides training opportunities through their Title V program to prepare older workers for competitive employment. Senior Connections provides participant scholarship funding to CCADS
- AARP Foundation-Circle Center provides Title V training opportunities as above
- A Grace Place, Hanover Adult Center, South Richmond Adult Day Care: Circle Center has joined forces with other non-profit adult day programs to market services, present at conferences, undertake joint legislative, public policy advocacy activities related to public funding.
- Area physicians, nursing homes, assisted living, home health and personal care providers: Circle Center coordinates care for admissions and discharges, as well as continuing care of those served jointly with in-home care providers.
- Logisticare (Medicaid transportation): CCADS rep on advisory board
- Feed More, Inc: Provides CCADS noon meal, planned by a licensed dietitian
- VCU College Work Study Program: CCADS provides real work and partial salary support for undergraduate students who need financial aid

# Financials

## Fiscal Year

	July
<b>Fiscal Year</b>	2018
<b>Projected Revenue</b>	\$2,010,997.00
<b>Projected Expenses</b>	\$2,010,996.00
<b>Endowment Value</b>	0
<b>Spending Policy</b>	Income Only
<b>Percentage (if selected)</b>	0%

## Form 990s

[Form 990](#)  
[Form 990](#)  
[Form 990](#)  
[Form 990](#)  
[Form 990](#)  
[Form 990](#)  
[Form 990](#)  
[Form 990](#)

## Detailed Financials

### Revenue and Expenses

Fiscal Year	2016	2015	2014
<b>Total Revenue</b>	\$2,132,130	\$1,961,462	\$1,217,508
<b>Total Expenses</b>	\$1,964,531	\$1,591,692	\$1,259,943

### Revenue Sources

Fiscal Year	2016	2015	2014
<b>Foundation and Corporation Contributions</b>	--	--	--
<b>Government Contributions</b>	\$663,316	\$478,118	\$37,625
<b>Federal</b>	--	--	\$37,625
<b>State</b>	--	--	--
<b>Local</b>	--	--	--
<b>Unspecified</b>	\$663,316	\$478,118	--
<b>Individual Contributions</b>	\$646,302	\$706,952	\$88,516
<b>Indirect Public Support</b>	\$60,000	\$63,570	\$51,676
<b>Earned Revenue</b>	\$745,517	\$694,134	\$821,035
<b>Investment Income, Net of Losses</b>	\$3,259	\$4,370	\$5,238
<b>Membership Dues</b>	--	--	--
<b>Special Events</b>	\$13,736	\$14,318	\$5,150
<b>Revenue In-Kind</b>	--	--	--
<b>Other</b>	--	--	\$208,268

### Expense Allocation

Fiscal Year	2016	2015	2014
Program Expense	\$1,630,231	\$1,240,761	\$1,008,366
Administration Expense	\$270,108	\$251,739	\$172,165
Fundraising Expense	\$64,192	\$99,192	\$79,412
Payments to Affiliates	--	--	--
Total Revenue/Total Expenses	1.09	1.23	0.97
Program Expense/Total Expenses	83%	78%	80%
Fundraising Expense/Contributed Revenue	5%	8%	43%

### Assets and Liabilities

Fiscal Year	2016	2015	2014
Total Assets	\$4,018,896	\$4,011,306	\$3,591,831
Current Assets	\$696,515	\$614,060	\$597,988
Long-Term Liabilities	\$788,633	\$0	\$915,095
Current Liabilities	\$156,001	\$1,104,643	\$139,904
Total Net Assets	\$3,074,262	\$2,906,663	\$2,536,832

### Short Term Solvency

Fiscal Year	2016	2015	2014
Current Ratio: Current Assets/Current Liabilities	4.46	0.56	4.27

### Long Term Solvency

Fiscal Year	2016	2015	2014
Long-Term Liabilities/Total Assets	20%	0%	25%

### Top Funding Sources

Fiscal Year	2016	2015	2014
Top Funding Source & Dollar Amount	--	--	--
Second Highest Funding Source & Dollar Amount	--	--	--
Third Highest Funding Source & Dollar Amount	--	--	--

### Capital Campaign

Currently in a Capital Campaign?	No
Goal	0
Capital Campaign Anticipated in Next 5 Years?	No

### State Charitable Solicitations Permit

Permit?	Exempt 0
Registration	Exempt 0

### Comments

#### Foundation Comments

- Audited financial statements and IRS 990s prepared by Smith & Eggleston, PC.



The Community Foundation Serving Richmond & Central Virginia  
7501 Boulders View Drive, Richmond VA 23225  
804-330-7400

