



Hearth Annual Report




2011



Mission Statement

Hearth is a non-profit organization dedicated to the elimination of homelessness among the elderly. This mission is accomplished through a unique blend of prevention, placement, and housing programs all designed to help elders find and succeed in homes of their own.

To this end, all housing operated by Hearth provides a creative array of supportive services that assist residents to age with dignity, regardless of their special medical, mental health, or social needs.  Hearth believes these goals are best accomplished through respect for elders and staff, with the desire to see both achieve their highest degree of potential.

Dear Friends This has been a remarkably productive year for Hearth and Hearth's work to end elder homelessness! It seems fitting that in this our 20th year, the culmination of so much hard work over the years has come to fruition. Major accomplishments include beginning construction on Hearth at Olmsted Green, initiation of the National Leadership Initiative, the expansion of our Outreach Program, and creation of the Community Advisory Council. In 2010 we developed a Strategic Plan to take us through 2014, and we want to share some of our exciting progress in the context of Hearth's four important strategic goals:

Goal 1: To increase the supply of permanent, affordable, and supportive housing in Greater Boston for homeless elders and elders at risk of homelessness. The creation of affordable service-enriched housing is a challenging one, but Hearth continues to make important progress. Hearth at Olmsted Green is the latest example of incredible collaboration between public and private partners. In spring 2012, we look forward to moving 59 elders into what will be their beautiful new home!

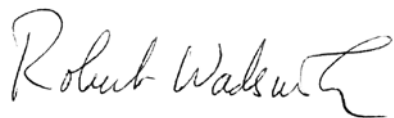
Goal 2: To place more homeless and at-risk elders in Greater Boston into existing permanent and affordable housing. Hearth's Outreach Team has been expanded by two case managers, including one case manager focusing on prevention who works with elders "at risk" of homelessness. This impressive team continues to do amazing work with approximately 350 of Boston's elders each year, helping them navigate the often challenging process of finding a safe and permanent place to call home.

Goal 3: To achieve national recognition for elder homelessness as a distinct problem requiring specific policy responses and tailored service solutions. Hearth's partnership with the Corporation for Supportive Housing led to a successful convening in Alexandria, Virginia on October 20, 2011 that has not only heightened awareness across the country of this under-recognized issue, but has led to strategic thinking and the development of specific policy recommendations that we expect will lead to the creation of service-enriched affordable housing that meet the needs of this population in a cost-effective way.

Goal 4: To promote the sustainability of Hearth, Inc. and the Hearth Model of Services. Summing up Hearth's progress towards this goal in a few sentences is very challenging because work is being done on so many fronts (as you will see in the pages of this report), but there are two things we wish to highlight and celebrate this year that are integral to sustaining Hearth's model. ① **Hearth's incredible staff** – their dedication to their work, creative thinking, and the incredible care they provide, is central to Hearth's success. ② **You, the Hearth community** – our donors and volunteers, our government and non-profit partners. We wouldn't have accomplishments to share without your belief in Hearth's work to end elder homelessness, and your generosity.

We thank you for your help in making this an outstanding year.

Sincerely,



Robert Wadsworth
Hearth Board Chair



Mark Hinderlie
Hearth President & CEO



Hearth at Olmsted Green

In April 2012, the doors at 2 Kingbird Road in Dorchester will open, and Hearth at Olmsted Green will become home to 59 currently homeless elders in Boston. Like all of our housing, Hearth at Olmsted Green will provide permanent affordable housing with on-site supportive services for the elderly residents in order to help them stay healthy and remain safely housed.

Though the day started with a rain storm, the sun shone on the Groundbreaking Ceremony held on June 9. Evelyn Friedman, Director of the City of Boston's Department of Neighborhood Development, and Tina Brooks, then Undersecretary from the Commonwealth's Department of Housing and Community Development, along with other officials, joined the Hearth Board of Directors and staff as we celebrated the commencement of construction.



Hearth at Olmsted Green in September



Hearth is employing sustainable development principles that will meet or exceed the City of Boston's Green Building standards.





Work began as soon as the celebration was over.



"We are grateful for the support of the City of Boston, the Commonwealth of Massachusetts, our investors and our philanthropic funders for making Hearth at Olmsted Green possible."



Mark Hinderlie

(left to right)Tom Mullen, Doug Poutasse, Myrna Putziger, Rebecca Ridley, Bob Wadsworth, Ellen Feingold, Sue Forti, Mark Hinderlie, Bob Houlihan, Greg Ansin, Greg Manousos, Diana Kelly, Marilyn Miller, and Bob Halloran.



Hearth Outreach

Hearth's Outreach Program provides comprehensive services to older adults who are homeless and facing housing instability. In 2010, the Outreach Program served 290 older adults: 244 were homeless and 46 were at risk of homelessness. The recently expanded Outreach Team, staffed with a Director of Outreach and six outreach case managers, will assist approximately 350 older adults each year. One of the six case managers works exclusively with individuals at risk of homelessness.

In September 2011 the Outreach Team was pleased to welcome two student interns from the Simmons School of Social Work who will be here through May 2012 to assist case managers with their stabilization work.

"This is a tough job but it is my honor to be one of the few people in my clients' lives that hear their moving stories and work with them on finding solutions."

*Ann Fletcher,
Outreach Senior Case Manager*



Members of Outreach's "Back on our Feet" support group meet weekly to help each other transition from being homeless to having a home.



The Outreach Program's Housing Search and Placement Services - To help homeless older adults find housing, Hearth's outreach team members:

- Visit shelters to identify homeless older adults and respond to referrals (outreach case managers partner with eleven area homeless shelters to identify those in need).
- Assess clients' housing priorities, barriers, and service needs to formulate individualized housing search, housing retention and/or relocation plans.
- Help clients to collect documents, information, and benefits to qualify for housing, health care, and service programs.
- Research housing, resources, and service opportunities for those in need of permanent homes and collaborate with other homeless service providers.
- Assist clients with applications, interviews, appeals, and mitigations.
- Arrange for moving assistance and donations of household goods.
- Connect clients with community-based health, behavioral health, and social service providers to help stabilize the formerly homeless within permanent housing.
- Provide stabilization support to help newly housed clients retain their homes and get the services they need for their long term success. A weekly stabilization support group for clients is facilitated at Hearth for additional peer mentoring.

Housing search and placement activities take place over a number of months, and the entire process can take as long as two years to complete.

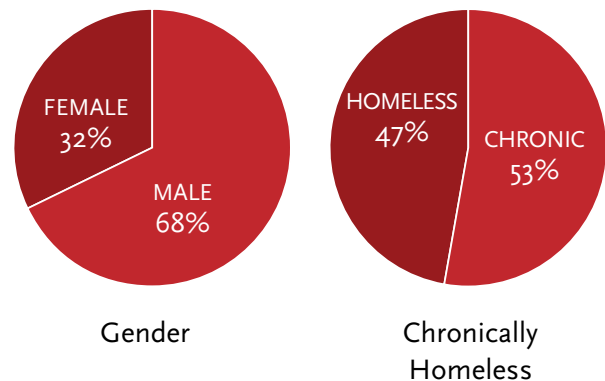
Adrienne Beloin, Director of Outreach, has expanded the outreach team and also the use of their *Efforts to Outcomes* case management software to help track and document progress. A clear plan for support, supervision and training is in place for the case managers and students, who are responsible for providing skillful interventions and support to revolving caseloads of 35 clients who are in often devastating crisis.

Who are the Outreach Program's clients?

Hearth serves a racially and ethnically diverse group of vulnerable older adults, age fifty and older, in the Greater Boston area who face a number of grave challenges.

The vast majority of outreach clients have incomes less than 30% of the area median income. In addition, the elders who are served by Hearth often are chronically homeless, have physical disabilities, chronic health problems, mental health challenges, and/or substance abuse issues.

2010 Figures:



A chronically homeless person, according to U.S. Department of Housing and Urban Development, is an unaccompanied homeless individual with a disabling condition who has either been continuously homeless for a year or more, or has had at least four episodes of homelessness in the past three years. To be considered chronically homeless, a person must have been on the streets or in an emergency shelter (not transitional housing) during these stays.

The living situations of the homeless older adults entering the Outreach Program during this one year period ranged from emergency shelters (85%); to transitional housing for homeless persons (12%); to non-housing settings (3%), which HUD defines as living on the streets, in cars, or at other public venues.



National Leadership Initiative to End Elder Homelessness



While our work on the ground is here in Boston, Hearth's mission is to end all elder homelessness!

Hearth has been working to raise awareness across the country that homelessness among older adults and elders is a problem with a cost effective solution: supportive housing. We have been enormously gratified at the enthusiastic response to our message. The effort to shed light on this issue and share strategies that work, has been welcomed and embraced by people and organizations who have been struggling as the numbers of homeless older adults continue to increase nationally.

Hearth found an important partner in The Corporation for Supportive Housing (CSH), an organization with offices in eleven states that provides advocacy, expertise, leadership, and financial resources to make it easier to create and operate supportive housing. Hearth and CSH have joined together to further this national dialogue about the impending crisis of homelessness among older adults and elders, and the importance of permanent supportive housing as an effective model to address this issue. The National Leadership Initiative to End Elder Homelessness is being co-chaired by Mark Hinderlie and Connie Tempel who is the Chief Operating Officer at CSH. To inform the effort, Hearth and CSH recruited a National Policy Advisory Panel comprised of policy makers, advocates and providers and chaired by Hearth Founder and Treasurer, Ellen Feingold.

To inform the work of the Panel and build on work done to date under the partnership, a National Convening on Ending Elder Homelessness was held on October 20th, 2011 at United Way Worldwide, in Alexandria, Virginia. Policy makers, elected and appointed officials, advocates, housing providers, and service providers to older adults and elders, including health and mental health providers came together to develop concrete strategies and policy recommendations that will meet the unique needs of this population.

With the theme "National Leadership Initiative to End Elder Homelessness: Strengthening Collaboration and Developing Solutions," the Convening provided an important forum for participants to discuss the housing needs of older adults and elders who are experiencing homelessness and to identify innovative cross sector strategies for meeting those needs. The Convening also featured an opportunity for participants to explore the current policy environment as it relates to housing for older adults and elders who are experiencing homelessness and to develop recommendations to meet the needs of this population.

58 people spent an exciting and informative day at this convening and important policy recommendations have been identified and will be promoted in the year ahead.

Elder Homelessness Congressional Meeting

Following the Convening, on Friday, October 21, 2011, Hearth and CSH gathered with Congressional Staffers at the United States Capitol to discuss the issue, and make recommendations calling for Congress and the Administration to improve programs and resources for older adults and elders who are homeless, or are at risk of homelessness. Federal policy recommendations focused on specific ways to promote the availability of affordable housing for older adults, as well as ways to increase access to services.



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1. NLI Planning Team Photo: Steve Renahan, Los Angeles Shelter Partnership; Stephanie Hartshorn, CSH; Mark Hinderlie, Hearth; Annie Garmey, Hearth; Ellen Feingold, Hearth; Connie Tempel, CSH & Peggy Bailey, CSH.

2. Ellen Feingold, Hearth; Stephanie Hartshorn, CSH; Connie Tempel, CSH; Mark Hinderlie, Hearth

3. (left to right) Leah Staub, Council of Large Public Housing Authorities, DC; Mohini Venkatesh, National Council for Community Behavioral Healthcare, DC; David Gillcrst, Project FIND, NY; Stephanie Hartshorn, Corporation for Supportive Housing, IL; Doug Poutasse, Hearth, MA; Jennifer Ho, United States Interagency Council on Homelessness, DC; Sue Stockard, Maloney Properties, MA.



3



We are Hearth
Volunteers & Residents



1



2



3

8





Volunteers

Since Hearth's beginnings, volunteers have played a vital role in our mission to end elder homelessness.

1. *The Blue Crew, made up of employees from Blue Cross Blue Shield, did some spring cleaning in the raised garden beds at Ruggles Assisted Living.*
2. *Boston University's BU OFF Broadway brought the theater to Hearth's residents, performing a medley of songs.*
3. *Google Group: As part of Google's Global Week of Service, employees from Google came to the Anna Bissonnette House to plant flowers and serve ice cream to the residents.*
4. *At the 2011 Volunteer Appreciation Reception, Ruggles site director Mary Himmelberger presented an award to Willie King for his dedicated service to the residents. Willie lives at Hearth at Burroughs Street and comes regularly to Ruggles to accompany residents to appointments and serve breakfast on the weekends.*

Hearth Residents

Many of the elders who live in our housing were homeless before coming to Hearth. But the elders Hearth serves are so much more than that. They come from a wide range of backgrounds – from different parts of the country and even other countries. Before they became homeless, they were lawyers, teachers, lobstermen, roofers, and caretakers; some of them are veterans. They are also parents, grandparents, aunts and uncles, sisters and brothers.

The Community Advisory Committee (CAC), which celebrated its one year anniversary in 2011, provides a forum for our residents and clients to voice their opinions and help shape Hearth's policies. It is made up of representatives from each of Hearth's residences and from the Outreach Program. Tom Mullen, a

committee member living at Ruggles Assisted Living, says he "like[s] being part of a group of people who look for ways to help make the lives of Hearth residents as problem free and comfortable as possible."

5. *Royonel has lived at Ruggles for nine years and has called Boston home for over 40 years. Born in Jamaica in 1932, he was a police officer in Kingston before traveling the world as a worker on a merchant ship. Royonel stays busy by keeping in touch with his family who live all over the world and watching cricket games at Franklin Park.*
6. *Ruggles resident Eric and Bishop resident Dottie danced at the Senior Prom, hosted yearly by Boston University students.*
7. *As part of our 20th Anniversary Year, Hearth and People Making a Difference (PMD) held a celebratory cookout for the residents on the beautiful MIT campus. Hearth founder Anna Bissonnette even volunteered with PMD and served the residents. Pictured: Anna Bissonnette and Mark Hinderlie with residents from the Anna Bissonnette House and Hearth at Burroughs Street.*



Hearth Events





Fore!... the Elders Golf Tournament

Hearth's classic golf tournament, last held in 2006, was brought back this year in honor of Hearth's 20th Anniversary.

1. *Hearth founder Anna Bissonnette, spent the day on the links with Carol Hartman and Bonnie Rafuse .*
2. *Hearth board member Bob Halloran and the team from WCVB-TV Channel 5 were the men's team winner.*
3. *Greg Manousos, Bob Joy, Matt Feiner, and Joe Danizio from Morgan, Brown, and Joy celebrate on the green.*
4. *The Eastern Bank foursome, Howard Feingold, Chris Scoville, Pam Feingold, and Bill Feingold, were not discouraged by the less-than-perfect weather.*
5. *Hearth Board Chair Bob Wadsworth, with board member Greg Ansin and Hearth President & CEO Mark Hinderlie.*

6. *Oscar Arostegui, Chris Cherry, George Findley, and Caitlin O'Brien from State Street were the coed's team winner. Oscar also won the men's longest drive.*

Honoring Founder Elsie Frank

As part of Hearth's 20th Anniversary year, our first residence, The Bishop Street House, was named the Elsie Frank House in honor of our founder. A reception was held at Morgan, Brown, and Joy to celebrate the naming. Members of the Frank Family attended the event and were presented with a plaque for the Elsie Frank House.

7. *Three generations of Elsie Frank's family attended the reception: grandson Jeff Breay with his wife Ani and their children Naomi and Zoe, along with daughter Doris Breay and son Representative Barney Frank.*

8. *Pam Feingold and Bob Glassman of Eastern Bank presented the Frank Family with the plaque that now hangs on the Elsie Frank House. They also kicked off the fundraising effort for the Elsie Frank Memorial Fund with a Leadership Gift of \$25,000. The fund will create an operating reserve for Hearth's programs.*





Coming Together

On October 6th the Hearth community came together to celebrate our 20th Anniversary. The food tasting event featured Aquitaine, Blue Hills Brewery, Canary Square, Coppa, Iggy's Bread, Myers + Chang, Post 390, The South End Buttery, Stella Restaurant, Stephanie's on Tremont, and Toro. Comedian Jimmy Tingle entertained the crowd, along with musicians Roberto Cassan & John Muratore. Area artists also donated small works for an art show. Mayor Thomas Menino and Representative Barney Frank were the honorary event chairs.

The surprise of the evening was Citizens Bank's announcement that Hearth had been named a 2011 Champion In Action.

1. Jerry Sargent, President of Citizens Bank Massachusetts and Stacey Marks Bronner, Station Manager at New England Cable News, presented Hearth with a check for \$25,000 as part of their Champions in Action award. The grant will furnish six apartments at Hearth at Olmsted Green.

2. Mark with three of Hearth's founders: Anna Bissonnette, Ellen Feingold, and Sandra Albright.

3. Comedian Jimmy Tingle regaled the crowd with his humorous social commentary.

4. Mark and Anna with Joyce and Mel King. The Kings were members of the Coming Together Honorary Committee and Joyce is a former Hearth board member and an active member of Hearth's Board of Visitors.

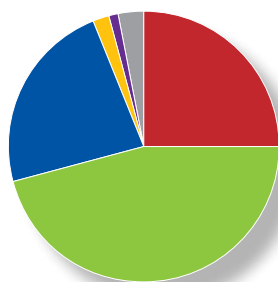
5. The Hearth Outreach Team at Coming Together: Kathleen Durkin, Richard Nickerson, Ann Fletcher, Carlton Johnson, and Eileen Marra. Not pictured, Director of Outreach Adrienne Beloin and Case Manager Ted Langston Chase.

6. Myers + Chang's table at the event could not be missed.



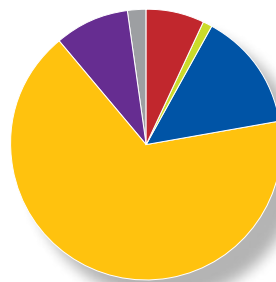
Financial Statement

January - December 2010



REVENUES

- Government grants and other contracts
- Rental Fees and program revenues
- Donations & Funds released from donor restriction
- Recovery of Affiliate Advances
- Unrealized Gain and Investments
- Other



EXPENSES

- Institutional advancement: Fundraising
- PR and Volunteer Management
- General and administrative
- Housing/Support services
- Outreach program
- Property management

Revenues	Total in Dollars	% of Total
Government Grants and other contracts	933,065	25
Rental Fees and Program Revenues	1,707,730	46
Donations & Funds Released from Donor Restriction	827,490	23
Recovery of Affiliate Advances	73,266	2
Unrealized Gain and Investments	26,227	1
Other	125,646	3
Total Revenues	3,693,424	100

Expenses	Total in Dollars	% of Total
Institutional Advancement:		
Fundraising	225,992	7
PR and Volunteer Management	36,720	1
General Administrative	492,907	15
Housing/Supportive Services	2,210,994	66
Outreach Program	287,725	9
Property Management	71,465	2
Total Expenses (before depreciation)	3,325,803	100

Net Surplus/(Deficit) before depreciation	367,621
Depreciation/amortization	(149,764)
Unrestricted Surplus/(Deficit)	217,857
Net Change Temporary Restricted Net Assets	144,530
Total Surplus/(Deficit)	362,387

Assets	Total in Dollars
Current Assets:	
Cash and Equivalent	1,582,950
Receivables	191,464
Funds Held in Trust	44,933
Prepaid Expenses and Deposits	88,773
Total Current Assets	1,908,120
Property and Equipment	4,077,507
Other Assets	1,373,193
Total Assets	7,358,820

Liabilities and Net Assets	Total in Dollars
Current Liabilities	928,535
Long-term debt, deferred interest and payables	2,472,446
Net Assets	3,957,839
Total Liabilities and Net Assets	7,358,820

Combined Statement of Activities and Operations

Hearth, Inc. partly owns and fully operates two for-profits: The Ruggles Assisted Living Limited Partnership facility and the East Concord Street Limited Partnership supportive housing facility. These limited partnerships are designed to create managed operating losses which the original investors use to offset operating profits in their general operations under the Federal Low Income Housing Tax Credit program (LIHTC). The combined activity fully represents the financial condition of Hearth, Inc. and related parties.

Hearth, Inc. Net Surplus (Deficit)	362,387
Ruggles Assisted Living Limited Partnership Net Income (Loss)	(206,824)
East Concord Street Limited Partnership Net Income (Loss)	(196,684)
Combined Net Surplus (Deficit)	(41,121)

Hearth Board of Directors

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Chair

Kevin McCall
Vice Chair

Ellen Feingold
Treasurer and Founder

Myrna Putziger
Clerk

Pamela Jones-Sampson
Assistant Clerk

Mark Hinderlie
Hearth President and CEO

Alan Abrams, MD
Greg Ansin
Robert Bickford
Anna Bissonnette - Founder
Rebecca Brown, MD
Jennifer Davis Carey, EdD
Bob Halloran
Robert Houlihan
Diana Kelly
Gregory Manousos
Marilyn Miller
Thomas Mullen
Mary S. Parker
Douglas M. Poutasse
Rebecca Ridley
Karyn Scheier
Irma M. Schretter

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Aristotle Bakalos
Fred Berman
Corey Bisceglia-Kane
Frank Capezera
Chet Cekala
Jennifer Clayson
Hannah Cohen
Steven Cohen
Emily Cole
Kim Comart
Jennifer Coplon
Brad Day
Sheila Devine
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Paul Freddura
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Edward Garmey
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Kate Kelley
Tom Kennedy
Suzanne Kenney
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Jeff Kessner
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Erin Russ
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Emily Saltz
Andreas Schneider &
Zoe Paolantonio
Sarah Bingman Schott
Ruth Schwartz
Janet Seckel-Cerrott
Johanna Smith
Adam Subber
Bruce Taylor
Don Thieme
Shirley Thorne
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