

# Sierra View Homes Retirement Community

## 2019 Annual Report

Reedley, CA

559-638-9226

[www.sierraview.org](http://www.sierraview.org)

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Corporation Members and Friends,

As a newlywed, back in 1984, I was invited to join the Sierra View Corporation. Within a year or two, I found myself serving on the board of directors. This was back when the office was a little trailer on the edge of the parking lot, surrounded by a sea of weeds which was at least half of our campus. I spent many years as the board secretary, trying to summarize other people's thoughts as I recorded minutes.

Now 35 years on, some maturing has occurred. Sierra View Homes now has three licensed administrators: Ro Linscheid as Executive Director, Vito Genna as Assistant Executive Director and Jenny Penner as Assisted Living Administrator. We have 150 employees and a budget of over \$9 million.

One decision we made this past year stands out as having an unanticipated, but positive effect on Sierra View. We pursued an off-campus venture with a struggling, sister facility in Selma. As a board, executive officer, and some staff we assisted and guided them in development, management and operations of their facility helping them get back on a new track. What we took away from the experience is a very, old lesson; as professionals we must continue to learn, unlearn and relearn.

Last March, two board members attended Mennonite Health Assembly in Wichita, Kansas. In 2019, board members have committed to jumping into the trenches and joining quarterly, staff Quality Assurance/Performance Index meetings where discussion of risk management, performance improvement plans and goal setting takes place across all departments. A board member shared of a recent conversation with our prescription supplier representative who said our staff does exemplary work!

Your board and our staff are committed at many levels to continue to provide a great living experience and outstanding service to our residents. This is evidenced by testimonial letters, positive Google reviews and happy faces on 260 people who presently call Sierra View "home." It's demonstrated by State and Federal inspections, State Medi-Cal Incentive Award and a Medicare 5 star rating. However, there is no time to rest on our laurels. We need to learn how to utilize new tools of today: electronic record keeping, artificial intelligence and robotics, to solve pressing new and yet timeless, problems not only providing housing and care for seniors of the First Mennonite Church, but persons of many different denominations and faiths in our community and beyond. All the while realizing that the future approaches every second unimpeded. Thank you.

Dorothy E. Boldt, Board Chairperson

## Major Capital Improvements Include

- Three Garden Apartment buildings were re-roofed
- Bedpan washers replaced in the Care Center
- New floor placed in Room 10
- Water heaters replaced
- Air Conditioning units replaced

## Sierra View Homes Board of Directors

Dorothy Boldt, Chair

Bill Braun, Vice Chair

Irvin Isaak, Chief Financial Officer and Auxiliary President

Ted Loewen, Secretary

Lance Zimmerman, Personnel

Joleen Siebert, Publicity

Members-at-large: Larry Harder, Joann Kalafut, Lois Strole





## Looks and Choices

New looks and new choices are projects well underway; as we respond to the expanding needs and individual tastes of our residents. Sierra View Homes Retirement Community has been undergoing a major new look to provide a better entrance to our campus. The first phase was a new doorway and gable for the administration office and the second phase is the new frontage for the main dining room. Small groups will be able to congregate in the new 1600 square foot dining room extension by the new coffee bar. An outdoor patio area to the front and side allows for groups or individuals to enjoy the sunny days.

Improvements made this year were more choices on the menu, especially more healthy choices. More equipment expanded our skilled nursing restorative exercise training opportunities. We have increased available transportation offerings, and we have advanced our Wi-Fi opportunities throughout the campus.

Sierra View is only able to move forward because we are blessed with 150 dedicated employees who provide exceptional services, high quality care and compassionate assistance to our residents; and because we have committed and generous residents who make up our community.

You inspire us in the leadership role to be committed to our core purpose of being an outstanding community that exudes fellowship, respect and care for each other. We strive to listen and understand how to continue to have a fulfilling life experience with a high value on extending each individuals independence.

We remain optimistic that we will continue to listen and learn from you as a gentle transition takes place in 2020. Ro, with her 30 years of long-term experience has been in a leadership position here at Sierra View Homes for the past five years. In February of 2020, Ro takes on the full responsibility as CEO of this wonderful and awe-inspiring retirement campus. Vito will continue in a part-time role lending his expertise to Risk Management, Regulations and Corporate Compliance.

Ro Linscheid and Vito Genna

## Sierra View Homes Vision Statement:

To be an outstanding full-service retirement community that celebrates and enhances the life of each resident and staff member, and that reflects Christ's message of hope and friendship.



**Office Staff**

Rosie Martin, Controller, Crystal Rogalsky, Admissions, Vito Genna  
Kecia Friesen, Administrator Assistant, Ro Linscheid, Kimiki Tapia, Billing

## Associations

Leading Age California

California Long Term Care Medicine (CLTCM)

Mennonite Health Services Alliance

California Assisted Living Association (CALA)

Reedley Greater Chamber of Commerce

California Association Health Facilities (CAHF)

American Health Care Association

## **RECOGNIZING OUTSTANDING COMMITMENT**

**The commitment of staff is evident as we continue with a high retention rate. Management staff members and most licensed nursing staff have been with us for more than five years.**

### **5 Years of Service**

Kecia Friesen, Admin. Assistant	Brooke Cabanas, CNA
Brenda Soares, Dietary Director	Rowelito Eugenio, Maint.
Adrianne Adayan, RCF Activities	Emma Balallo, RCF PCG
Romarie Santos, Dietary Aide	

### **10 Years of Service**

Jenny Penner, Residential Care Administrator

### **15 Years of Service**

Rosie Ceballos, CNA	Virginia Rosales, LVN
Antonia Rosales, Plant Operations Assistant	

## **Management Team**

Vito Genna, Executive Director/CEO

Ro Linscheid, Associate Executive Director

Kecia Friesen, Administrative Assistant

Barbara Alatorre, R.N., Director of Nursing

Joyce Gregory, R.N., Director of Staff Development

Brenda Soares, Food and Nutrition Supervisor

Jenny Penner, Residential Care Administrator

Kelly Brady, Campus Activity Director

Julia Duran, Activity Director/Social Services

John Long, Plant Operations

Janet Habegger, M.D., Medical Director

There are ten active members of the **Circle of Silver Stars** employees who have served our residents for 20 years or more.

Virginia Cruz , CNA	41 years
Carmen Echeveste, Prep Cook	32 years
Estella Pena, RN, Assisted Living	32 years
Irene Botello, Housekeeping	31 years
Teresa Jimenez, LVN	29 years
Minerva Rodriguez, Baker	28 years
Joyce Gregory, RN, DSD	22 years
Juana Duarte, RNA	21 years
Jill Smith	20 years
Janie Garcia	20 years





## Resident Profile

During all of 2019 we were able to maintain a steady census throughout our community. There are waiting lists for all areas of Sierra View Homes Retirement Community.

## Terraces and Garden Apartments

A total of 21 apartments changed hands through the course of the year. There are 115 independent living apartments ranging from a 479 sq. ft. Studio to a 1196 sq. ft. two-bed/two-bath apartment. On December 31, 2019 we had 134 residents in the Sierra View Residences. Of the 134 residents, there are 96 women and 38 men. We have 22 couples on campus.

## Nursing Care Center

Our Nursing Care Center provides ongoing care for people who need 24-hour, 7 days-a-week care. We provide Medicare A rehabilitation for success in returning to prior level of function following a surgery, fracture, and/or other issues that can be debilitating to a person. We have been fortunate to maintain a good census throughout 2019. Through therapeutic and skilled care 64 were discharged to their home or lower level of care.



## Residential Care/Marden's Place

On December 31, 2019, Sierra View Homes Assisted Living had 34 in Residential Care. All 21 large rooms were rented as singles and all 15 small rooms were also occupied.

In Marden's Place, 5 shared rooms and 8 single rooms were occupied according to the census for December 31, 2019. The census showed 17 people, 3 men and 14 women living in Marden's Place.

Jenny Penner, Administrator; Estella Pena, RN; and Cecilia Barraza, LVN provide leadership and clinical care to all residents in Residential Care and Marden's Place.



## **Sierra View Homes Auxiliary Board**

### 2019 Members

Irvin Isaak, President

Kathy Hayes, Vice President

Denny Mason, Secretary

Stella Bohn, Treasurer

Louise Auernheimer, Membership

Yvonne Turner, Publicity

Sandra Reimer, Parliamentarian

Members at-large: Joann Kalafut,  
Joyce Klippenstein and Joe Halpen



## **Financial Health**

The financial health of Sierra View Homes Retirement Community remained strong for 2019. The result of a full census, a Medi-Cal Incentive Award, and positive distribution from our Everence Mutual Funds created an increase of \$490,625 in net assets. The Annual Audit was verified by Jeffrey Carter, CPA and reviewed by the Sierra View Homes Board of Directors. The results allowed for a minimal rate increase for 2020, an enhancement of the Residential Assistance Fund and an investment in our Capital Campus improvement.



## **Strategic Planning Committee**

Back row: Vito Genna, Dorothy Boldt, Wayne Zimmerman, Dick Peterson, Irvin Isaak, Rusty Moyer, Jim Krause, Lois Strole, Bill Braun.

Front row: Louise Auernheimer, Jenny Penner, Ro Linscheid, Joann Kalafut, RuthAnn Krause

## BALANCE SHEET, ASSETS

### Current assets:

Cash	1,874,443
Accounts receivable, net of \$160,891 allowance for doubtful collections	1,594,131
Current portion, loan to Bethel Lutheran Home	58,467
Prepaid expenses	51,740
Marketable short-term investments	1,723,543
<u>Restricted assets, certificate debt trust agreement (for use in current debt payments)</u>	<u>313,786</u>
<b>Total current assets</b>	<b>5,616,110</b>

### Property and equipment:

Land, buildings, and improvements	20,067,084
Equipment, furniture, and fixtures	2,523,442
Transportation equipment	131,665
<u>Less accumulated depreciation</u>	<u>(9,767,273)</u>
<b>Total property and equipment</b>	<b>13,494,918</b>

### Other assets:

Loan to Bethel Lutheran Home	121,583
Restricted assets, certificate debt trust agreement (reserve account until debt matures)	386,127
<u>Investments in captive insurance companies</u>	<u>122,084</u>
<b>Total other assets</b>	<b>629,794</b>

<b>Total assets</b>	<b>\$19,740,822</b>
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## LIABILITIES AND NET ASSETS

### Current liabilities:

Accounts payable	325,576
Wages and related benefits payable	394,831
Resident prepayments for services	100,368
Interest payable	122,785
<u>Current portion of long-term debt</u>	<u>465,464</u>
<b>Total current liabilities</b>	<b>1,407,024</b>

### Long-term liabilities:

Other accrued liabilities	2,336
Deferred revenue from advance care fees	231,323
Long-term debt:	
2016 certificate debt, Series A	9,750,000
2016 certificate debt, Series B (net of current portion of \$385,000)	1,050,000
California Health Facilities Financing Authority (net of current portion of \$80,464)	654,309
Debt issuance premium (certificate debt), net of accumulated amortization	490,391
<u>Debt issuance costs, net of accumulated amortizations</u>	<u>(472,510)</u>
<b>Total long-term debt</b>	<b>11,472,190</b>
<b>Total Long-term liabilities</b>	<b>11,705,849</b>
<b>Total liabilities</b>	<b>13,112,873</b>
<b>Net assets: Without donor restrictions</b>	<b>6,627,949</b>
<b>Total Liabilities and net assets</b>	<b>\$19,740,822</b>

### Revenue without donor restrictions:

Skilled nursing services (Medicare \$1,760,945; Medi-Cal \$2,257,820; Private \$1,481,197)	5,499,962
Assisted and Independent living revenue	3,497,445
Other operating revenue	162,069
Investment income (including realized and unrealized gains of \$163,553)	263,891
<u>Charitable contributions</u>	<u>29,469</u>
<b>Total revenue without donor restrictions</b>	<b>9,452,836</b>

	<b>Program Services</b>	<b>Support Services</b>	
<b>Expenses with out donor restrictions:</b>			
Nursing services	\$4,519,235	-	4,519,235
Dietary services	1,020,442	-	1,020,442
Operation and maintenance	711,887	-	711,887
Administration	-	701,366	701,366
Housekeeping, laundry, and linen	439,237	-	439,237
Activities and social services	160,400	-	160,400
Education	65,216	-	65,216
Depreciation	673,239	7,681	680,920
Interest, net of debt premium and loan cost amortization	382,380	-	382,380
Insurance and property taxes	172,347	8,179	180,526
<u>Bad debts</u>	<u>134,094</u>	<u>-</u>	<u>134,094</u>
<b>Total expenses without donor restrictions</b>	<b>8,278,477</b>	<b>717,226</b>	<b>8,995,703</b>

<b>Increase in net assets</b>	<b>457,133</b>
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<b>Beginning net assets</b>	<b>6,170,816</b>
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<b>Ending net assets</b>	<b>\$6,627,949</b>
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**Sierra View Homes Retirement Community is a non-profit community benefit corporation.** It has no paid shareholders and the Board of Directors is voluntary. All proceeds are reinvested into Sierra View Homes infrastructure and for the benefit of the residents we serve. Sierra View Homes is authorized by the authority of the Internal Revenue Service Code Section 501(c)(3).

On this page you will find the **Balance Sheet and Statement of Activities and Changes in Net Assets** of the audited Financial Statements for the period ending December 31, 2019. A copy of the complete Financial Statements, including narratives, may be requested from the office.



## **THE SPIRIT OF GIVING**

Time, treasure and talent are ways that you can give to Sierra View Homes Retirement Community. Volunteers, both individuals and groups, are always welcome. By giving your time to our residents, you allow them to have additional personal time talking to and interacting with people. Monetary donations allows us to **enhance the lives of our residents**. We are grateful for memorial donations given in memory of residents, planned giving, such as estate bequeaths and annuities, and donations of cash for either daily support of our mission or for a restricted reason such as the building fund. Sierra View residents benefit also from donations made directly to the Auxiliary.

### **Thank you for your generous spirit of giving:**

Pat Arnold	Derold and Barbara Franks
Gordon and Yvonne Turner	Bob and Ruth Enns
Vito and Adriana Genna	Jerry and Ro Linscheid
Sierra View Homes Auxiliary	LaVerne Youngberg
Richard Peterson	John Varin
Norma Andres	Lois Strole
Sunrise Kiwanis Club of Reedley	Byron Hirata
Vern and Judy Warkentin	
Larry and Gail Harder	
Linda Penner	
Barbara Loudon	
Gordon and Yvonne Turner	

Contributions to the **Memorial Fund** can be given or made in memory of a friend or loved one. Memorial contributions received during the year were **IN MEMORY OF:**

Lydia Heinrichs  
Gordon and Yvonne Turner  
Judy Studebaker  
Linda Salwasser  
Henry Rogalsky  
Leroy and Dianne Huerta  
Edna Warkentine

Erma Isaac  
Stanley and Ann Isaac

Barbara Wobschall  
Keith and Lenette Burckhart  
Michael and Amy Maurer  
Ed and Twyla Pauls

Bill Cairns  
Gordon and Yvonne Turner

Elizabeth Butler  
Nancy Ewert

Ross Spallina  
Leroy and Dianne Huerta

Clayton Auernheimer  
Louise Auernheimer

Carolynne Lee  
Martha Lange

Duane McCutchan  
Annie Sawatzky



CNA for 39 years

Mick Brunswick  
Dorothy Halameier

Eli Friesen  
Jerry and Ro Linscheid

Escolastica "Lassie" Andres  
Jerry and Ro Linscheid



Georgia Linscheid

Allen Linscheid  
Merle and Florence Siebert  
Jack and June Biggers  
Ken and Sally Zech  
Marsha Osaka  
Dalia Jimenez  
Steve and Michelle Heirnichs  
Yolanda Hernandez  
Carol Just  
Daniel and Wanda Doerksen  
Jean Flores  
Irvin and Bernice Isaak  
Clayton and Rachel Harrison  
Vern and Judy Warkentin  
Rod and Kathy Misaki  
Carol Conway  
Diane Freet  
Joanne Andrews  
Doris Reimer  
James and Donna McBrien  
Sandra Mills  
Kristin Bernhardt  
Lois Strole  
Joleen Siebert  
Gordon and Yvonne Turner  
Robert Sommer  
David and Carol Krehbiel  
Ted and Frances Loewen  
Wayne and Martha Zimmerman

Melva Ewy

Jerry and Ro Linscheid  
Merle and Florence Siebert  
Richard and Linda Laine  
Vern and Judy Warkentin  
Doris Reimer  
Irvin and Bernice Isaak  
Terry Bessant  
Arnold Ewy  
James and Donna McBrien  
John and Frances Rogalsky  
David and Carol Krehbiel



Clara Unruh

Jean Unruh

Helen Reimer

Nancy Ewert

Robert Suderman

Annie Sawatzky  
Darlene Schroeder  
Katherine Enns





