



#### **Services for Seniors**

- Home Care Services
- Transportation
- Classes and Activities
- Weekend Respite Program
- Medical Procedure Transportation
- Lifelong Learning
- Meals
- Companions
- Transportation
- RN Care Management

# **SURREY** 2019 Annual Report



#### **Surrey Mission**

Surrey Services helps older adults  
to live with independence and dignity  
and continue as engaged  
members of the community.

# Making a Difference One Life at a Time.

Wendy didn't know much about Surrey when she received an invitation to Surrey's Grand Opening celebration at East Goshen. The timing was good. Wendy had worked as a caregiver and then a family caregiver for her mother in West Chester. Her mother died and Wendy had recently retired. She was looking for a place where she could stay active, meet people and find purpose.



"The first activities I tried in East Goshen were the exercise classes: Zumba, yoga, balance and strength," she recalled. She also volunteered as a greeter for new members. Then she discovered that her Surrey membership enabled her to take classes at any Surrey location.

"I started to go to exercise in Devon on Mondays and Wednesdays and then East Goshen the rest of the week."

One day she decided to try lunch and was thrilled to discover the meal was affordable and delicious. "I also loved that people were welcoming and friendly," Wendy adds.

In time, one of the people she met at lunch became a role model. Clara celebrated her 101st birthday at Jeanne's Place, the Devon café in July. Wendy says her goal is to age like Clara, staying active and social.

*Connecting with others and staying healthy.*



# Dear Friends,

2019 was a year of growth for Surrey. Thanks to generous donors, Surrey was able to launch important initiatives to continue the mission of helping older adults. We expanded Surrey's footprint to a new location, improved our facilities and provided low or no cost programs and services to members.

A fifth Surrey location opened in East Goshen offering programs two days per week at the United Church of Christ. That was not the only move Surrey experienced this year. The Havertown center moved two blocks away to the parish hall at Annunciation BVM Church to a bigger, brighter and more collaborative space.

Surrey Home Care Services launched its Weekend Respite Program. This five-hour program piloted every other Saturday provides a much-needed break for family caregivers. Participants enjoy activities, music, gentle exercise and nutritious meals at our Devon center where they are engaged and safe.

While donors have provided funding, volunteers have supported every initiative — from greeting new members at East Goshen to assisting with the Weekend Respite Program. Their invaluable support is truly the cornerstone of Surrey's success.

This year, with the help of donors and community partners, Surrey held two, new successful fundraisers: The Meridian Bank Golf Classic and the Surrey Fashion Show. We are so thankful to those businesses, advertisers and donors who supported these new endeavors.

One of the best statistics from 2019 comes from our annual Membership Survey. Nearly 97% of respondents said that being a member of Surrey has improved their outlook on life. That is truly the reason for the mission and, with your support, Surrey will continue to thrive.



Bob Madonna  
President & CEO



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# Community Center Highlights



## Devon

Enjoying Opera and Classical Music, a volunteer-led program, won runner-up in the Cultural Programs category for the 2018 National Institute of Senior Centers Programs of Excellence. The program was chosen for the national award because it is innovative, creative and replicatable.



## Broomall

Broomall spearheaded the initiative to bring together members from all sites through global programming. The successful programs included community services projects, day trips, bowling, games afternoons, and trips to visit the other Surrey sites for lunch.

## East Goshen

A fifth Surrey center launched at the United Church of Christ in East Goshen. More than 200 people attended the Grand Opening. Initially, programming was offered two days per week. After 90 days of consistently growing attendance, Surrey began planning a third day of programming to meet demand.

## Havertown

Havertown successfully moved two blocks from its existing location to the parish center at Annunciation BVM Church. The layout of the new location makes it possible for members to interact and socialize more with one another during programs. They have also created partnerships and new affiliations with area seniors' groups to develop joint programs.

## Media

Through a commitment from Surrey staff and volunteers and an investment by the Delaware County Office of Services for the Aging (COSA), Surrey Media is now positioned to offer **ten** evidence-based programs to older adults in our community. The proven benefits of these programs include: improved quality of life, increased or maintained independence, positive health behaviors, reduced disability, reduced pain and improved mental health.

**"I enjoy the lunches at Havertown and Devon. I see friends, meet people and eat a nutritious meal for a reasonable price."** — Tom

**"Art class made me realize that I was able to paint. At first it was a challenge, but I enjoyed trying something new."** — Cate

**"I had a fall and the ER doctor was amazed I was not badly injured. She asked about my health and I told her I exercised at Surrey several times a week, including yoga. The doctor told me to keep it up, those exercises helped flexibility and made my fall less severe."** — Anne





# Home Care Services

- Personal Care and Social Companions
- RN Care Management
- Medical Procedure Transportation
- House Cleaners
- Personal Financial Management
- Geriatric Care Management
- Live in Caregivers
- Weekend Respite Program



"My husband enjoys the new people he's met at the Weekend Respite Program. I also think the many activities offered, especially exercise and music, make this program unique and engaging for him."

— Brenda, wife of a participant

"My father and I are fortunate to have Surrey's Care Managers accompany him to doctor visits and manage his follow up and medications. I live out of state and cannot be at every appointment."

— Kelsey



Surrey launched the Respite Care Program, to give family caregivers a break, in January. Jeanne learned about the new weekend program and immediately wanted to help. She felt she could contribute significantly to the program because of her experience as a speech language pathologist and her role as a family caregiver for her father, who had Alzheimer's. Jeanne is also the niece of Surrey's founder, Jeanne LaRouche, and has always felt close to Surrey's mission.

Jeanne helps with every facet of the program; greeting participants, assisting them throughout the day, and scheduling volunteers. "Our goal is to promote engagement and social interaction in a family setting." She adds that the staff and volunteers always support the independence and dignity of participants while making the day enjoyable and personalized.

From its start, volunteers have been actively engaged in support of the program. Surrey Board Member, Jean Kozicki, helps with scheduling and on-site coordination. Members from Surrey Broomall bring supplies and lead crafts and activities. Volunteers have provided musical entertainment. This outpouring of support from volunteers with diverse backgrounds really speaks to Surrey's mission, and its philosophy of neighbor helping neighbor.

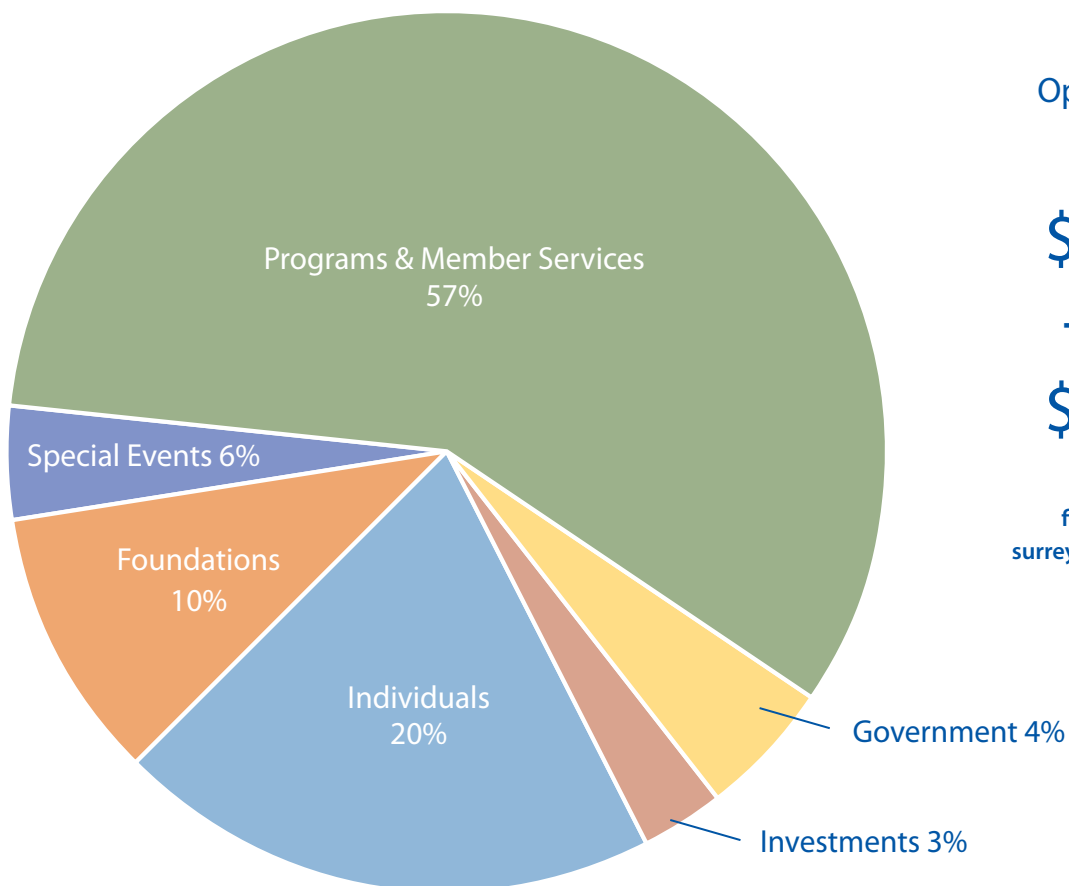




## Financial Overview *Statement of Financial Position — June 30, 2019 and June 30, 2018*

ASSETS	2019	2018	LIABILITIES AND NET ASSETS	2019	2018
<b>CURRENT ASSETS:</b>			<b>CURRENT LIABILITIES:</b>		
Cash and cash equivalent . . . . .	\$89,321 . . . . .	\$63,512	Accounts payable . . . . .	90,034 . . . . .	101,953
Accounts receivable . . . . .	243,717 . . . . .	276,236	Accrued liabilities . . . . .	119,563 . . . . .	121,629
Current portion — . . . . .	70,850 . . . . .	38,595	Deferred revenue . . . . .	43,455 . . . . .	23,730
unconditional promises to give			<b>Total Current Liabilities . . . . .</b>	<b>253,052 . . . . .</b>	<b>247,312</b>
Prepaid expenses . . . . .	24,930 . . . . .	30,049			
<b>Total Current Assets . . . . .</b>	<b>428,818 . . . . .</b>	<b>408,392</b>	<b>NET ASSETS:</b>		
<b>PROPERTY AND EQUIPMENT:</b>			Without donor restrictions . . . . .	6,134,891 . . . . .	6,260,481
Property and Equipment . . . . .	5,023,899 . . . . .	5,015,790	With donor restrictions . . . . .	125,400 . . . . .	—
Less: Accumulated depreciation . . . . .	(933,563) . . . . .	(768,733)	<b>Total Net Assets . . . . .</b>	<b>6,260,291 . . . . .</b>	<b>6,260,481</b>
<b>Net Property and Equipment . . . . .</b>	<b>4,090,336 . . . . .</b>	<b>4,247,057</b>	<b>TOTAL LIABILITIES</b>		
<b>OTHER ASSETS:</b>			<b>AND NET ASSETS . . . . .</b>	<b>\$6,513,343 . . . . .</b>	<b>\$6,507,793</b>
Long term unconditional promises to give . . . . .	— . . . . .	—			
Security deposits . . . . .	— . . . . .	—			
Long term investments . . . . .	1,994,189 . . . . .	1,852,344			
<b>Total Other Assets . . . . .</b>	<b>\$1,994,189 . . . . .</b>	<b>\$1,852,344</b>			
<b>TOTAL ASSETS . . . . .</b>	<b>\$6,513,343 . . . . .</b>	<b>\$6,507,793</b>			





Surrey Services  
Operating Funds FY19

**TOTAL REVENUE:**  
**\$4,741,413**

**TOTAL EXPENSES:**  
**\$4,741,603**

View Surrey's audited  
financials and Form 990 at  
[surreyservices.org/about/financials](http://surreyservices.org/about/financials).



# SURREY

## Community Support

We are thankful to the hundreds of donors who have supported Surrey's mission from July 1, 2018 to June 30, 2019. Gifts of \$250 and above are listed below. These represent only a portion of the many gifts received this year. See our website for a complete list. We are truly grateful to all who support Surrey's work in the community.

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# Thank you

to our many corporate and professional neighbors who have generously donated their skill, time and services to Surrey over the past year.

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# SURREY

*Services for Seniors*

**DEVON** 60 Surrey Way, Devon, PA 19333 • 610-647-6404

**BROOMALL** (at Trinity Church) 144 Lawrence Road, Broomall, PA 19008 • 215-307-7158

**EAST GOSHEN** (at United Church of Christ) 1201 N. Chester Road, West Chester, PA 19380 • 610-389-1124

**HAVERTOWN** (at Annunciation BVM Parish) 401 Brookline Blvd., Havertown, PA 19083 • 610-446-2070

**MEDIA** 302 S. Jackson Street, Media, PA 19063 • 610-566-0505

**CONSIGNMENT SHOP** 810 Lancaster Avenue, Berwyn, PA 19312 • 610-647-8632

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