



Be bold.

Be you.

Be Otterbein.



At A Glance 2023/2024

THE NEW OTTERBEIN SENIORLIFE

Mission Statement

Inspired by faith

Otterbein is a mission-based organization, inspired by FAITH. Faith can be in a higher being, a concept, family, friends, and/or human nature.

we strive

Otterbein will continually STRIVE to enrich individual life journeys.

to enrich individual life journeys

Otterbein will provide a choice of quality living environments, care and services, each designed TO ENRICH INDIVIDUAL LIFE JOURNEYS.

for all

Celebrating the similarities and differences among all constituents - residents, elders, partners (employees) and their respective families; volunteers, donors, board members and the local communities in which we serve.

***Inspired by faith, we strive
to enrich individual life journeys for all.***



**"Be bold, be brave enough
to be your true self."**

A New Mission Statement

Why Now?

The previous MISSION statement was adopted in 1995 and served Otterbein well.
But, a lot has changed in 28 years!

THEN

- Otterbein was known as “Otterbein Homes”.
- Otterbein was comprised of five retirement communities.
- Otterbein was mis-perceived as serving only United Methodist residents.

NOW

- Otterbein is known as Otterbein SeniorLife.
- Otterbein is comprised of 22 organizations offering a variety of senior living and care options.
- Otterbein promotes and celebrates the similarities and differences of all constituents.

THE NEW OTTERBEIN MISSION STATEMENT

***Inspired by faith, we strive
to enrich individual life journeys for all.***



**"Fortune befriends
the bold."**

Communities



CRIDERSVILLE

100 Red Oak Dr.
Cridersville, OH 45806
419-645-5114
otterbein.org/cridersville

Independent Living Residences	118
• Homes / Villas	94
• Apartments	25
Assisted Living Residences	38
Nursing Residences	50
• Post-Acute Rehab	17
• Long-Stay	33
Persons Served in 2022	410
Number of Employees	≈175



FRANKLIN

1070 W. Jefferson Street
Franklin, IN 46131
317-736-7185
otterbein.org/franklin

Independent Living Cottages	187
Independent & Assisted Living Apartments	172
Nursing Residences	157
• Post-Acute Rehab	24
• Long Stay	133
Persons Served in 2022	791
Number of Employees	≈ 300



GRANVILLE

2158 Columbus Rd.
Granville, OH 43023
740-321-0400
otterbein.org/granville

Independent Living Residences	135
• Homes / Villas	75
• Apartments	60
Assisted Living Residences	29
Nursing Residences	20
• Post-Acute Rehab	10
• Long-Stay	10
Persons Served in 2022	275
Number of Employees	≈ 134



LEBANON

585 N. St. Rte. 741
Lebanon, OH 45036
513-932-2020
otterbein.org/lebanon

Independent Living Residences	542
• Homes / Villas	383
• Apartments	159
Assisted Living Residences	67
Nursing Residences	154
• Post-Acute Rehab	32
• Long-Stay	122
Persons Served in 2022	1,295
Number of Employees	≈ 400



MARBLEHEAD

9400 North Shore Blvd.
Marblehead, OH 43440
419-798-8203
otterbein.org/marblehead

Independent Living Residences	57
• Homes / Villas	33
• Apartments	24
Assisted Living Residences	37
Nursing Residences	20
• Post-Acute Rehab	10
• Long-Stay	10
Persons Served in 2022	226
Number of Employees	≈ 100



PEMBERVILLE

20311 Pemberville Rd.
Pemberville, OH 43450
419-833-7000
otterbein.org/pemberville

Independent Living Residences	107
• Homes / Villas	74
• Apartments	33
Assisted Living Residences	64
Nursing Residences	48
• Post-Acute Rehab	15
• Long-Stay	33
Persons Served in 2022	428
Number of Employees	≈ 150



ST. MARYS

11230 St. Rte. 364
St. Marys, OH 45885
419-394-2366
otterbein.org/stmarys

Independent Living Residences	141
• Homes / Villas	104
• Apartments	37
Assisted Living Residences	42
Nursing Residences	51
• Post-Acute Rehab	12
• Long-Stay	39
Persons Served in 2022	418
Number of Employees	≈ 190



SUNSET HOUSE

4020 Indian Rd.
Toledo, OH 43606

419-536-4645
otterbein.org/toledo

Independent Living Residences	65
• Homes / Villas	0
• Apartments	65
Assisted Living Residences	68
Nursing Residences	20
• Post-Acute Rehab	15
• Long-Stay	5
Persons Served in 2022	290
Number of Employees	≈158



SUNSET VILLAGE

9640 Sylvania-Metamora Rd.,
Sylvania, OH 43560

419-724-1200
otterbein.org/sylvania

Independent Living Residences	32
• Homes / Villas	32
• Apartments	0
Assisted Living Residences	56
Nursing Residences	50
• Post-Acute Rehab	15
• Long-Stay	35
Persons Served in 2022	280
Number of Employees	≈155



**“We believe
in being bold.”**

Neighborhoods

Our Small House Neighborhoods Skilled Nursing and Rehab

Otterbein neighborhoods provide a new and innovative style of nursing care in small houses designed specifically to free elders and those that serve them from the mindset of institutional care in the form of the internationally renowned Green House Project. Each Otterbein neighborhood has five small houses, cumulatively providing 60 private suites and employing approximately 90 partners. In 2022, Otterbein neighborhoods served 1,804 elders.



Northern Ohio Neighborhoods

Monclova

5069 Otterbein Way
Monclova, OH 43542
(419) 326-8594

Perrysburg

3529 Rivers Edge Road
Perrysburg, OH 43551
(419) 326-8593

Central Ohio Neighborhoods

New Albany

6690 Liberation Way
New Albany, Ohio
43054
(614) 505-9421

Gahanna

402 Liberty Way
Gahanna, Ohio 43230
(614) 505-9241

Southern Ohio Neighborhoods

Maineville

201 Marge Schott Way
Maineville, OH 45039
(513) 757-0325

Middletown

105 Atrium Drive
Middletown, OH 45005
(513) 729-6895

Union Township

1114 Neighborhood Dr.
Batavia, OH 45103
(513) 757-9376

Loveland

6405 Small House Circle
Loveland, OH 45140
(513) 757-9103

Springboro

9320 Avalon Circle
Springboro, OH 45458
(937) 505-8989





**“Freedom lies
in being bold.”**

Home Services

Otterbein Wellness Senior Services

Home Care to Enhance Independence

Wellness Senior Services include on-site clinics, personal care, homemaker services, companionship, transportation and in-home nursing care.

2022 Persons Served – 505

The Services are available to Otterbein and local community residents near Otterbein SeniorLife Communities in Cridersville, Lebanon, Marblehead, Pemberville, and St. Marys. Contact your local Otterbein community for information.

Otterbein Home Health

Superior Skilled Nursing & Rehab Care in the Comfort of Home

Otterbein Home Health serves those recovering from illness, injury or accident bringing professional care and compassion to the doorstep. Services include nursing, physical therapy, occupational therapy, speech therapy and social work.

2022 Persons Served – 684

Personalized care and therapy is available in each of the following southwest Ohio counties: Butler, Clermont, Clinton, Fayette, Greene, Hamilton, Highland, Montgomery, Preble and Warren.

570 N. State Rte. 741 | Suite 222 | Lebanon, OH 45036
513-696-8565 | Otterbein.org/homehealth

Otterbein Hospice

Providing Guidance, Care and Comfort at the End of Life

At the end of life's journey, Otterbein Hospice is physically, emotionally and spiritually present for those they serve in the comfort of home, wherever that might be.

2023 Persons Served – 157

Southwest Ohio counties currently served: Butler, Clermont, Clinton, Fayette, Greene, Hamilton, Highland, Montgomery, Preble, and Warren.

570 N. State Rte. 741 | Suite 218 | Lebanon, OH 45036
513-696-8540 | Otterbein.org/hospice

Otterbein Ashanti Hospice

Committed to providing hospice care that enables those with life-limiting illnesses or conditions the ability to make their journeys' end their own.

2023 Persons Served – 132

While hospice is a way of compassionately caring for a person nearing life's end, Ashanti Hospice is actually about living—living to the very end of life with the highest quality possible. Our care focuses on the whole person—not just the illness—and centers on comfort. Serving in Fulton, Lucas, Ottawa, and Wood counties in northwest Ohio.

4040 Indian Road | Toledo OH 43606
419-724-1047 | Otterbein.org/hospice



**“Let us be bold.
Let us be brave.
Let us be together.”**

Introducing the Otterbein Staffing Agency

The Otterbein Staffing Agency (OSA) launched January 1, 2023, with the objective of supporting staffing needs of Otterbein SeniorLife locations. OSA is focused on health care, initially providing registered nurses, licensed practical nurses, state tested and certified nurse aides. In the future, OSA will extend support to other healthcare providers and will include housekeepers, grounds and maintenance personnel, drivers, and cooks, as needs arise.

The Otterbein Staffing Agency will:

- Improve the quality of contracted staff
- Replace third-party agency use with OSA staff
- Provide a viable work option for an ever-changing workforce, who wish to work and be scheduled in an untethered way, providing a competitive advantage for Otterbein.





- 8052 hours worked
- 920 shifts completed
- OSA will provide support to all Otterbein locations

Accomplishments

**PARTNERS
IN INNOVATION**
Host for the internationally
attended workshop



Established
a Workforce
Development and
Strategy
Department

NEW STRATEGIC PLAN

- THE Place to Live
- THE Place to Work
- THE Place for
Extraordinary Care
- THE Place for a
Fulfilling Future

Started the



Serving on
the board of:



COMMUNITY STEWARDS

Otterbein team
members serve on
15+ community
boards of directors

Participating
members of
26 Ohio/Indiana
Chambers of
Commerce

Served
7,190 person
in 2022, a 17%
increase over
prior year



HELPING
PEOPLE
HELP OUR
COMMUNITY

Large Business of the Year

Residents
volunteered over
65,000 hours
of community
service



A Medicare Advantage
program designed
for residents in
long-term care

Established
the



Completed expansion of 90 new suites at Otterbein nursing Neighborhoods 540 Capacity

Constructed 10 independent living villas at the Sunset Village Community

Committed to developing the future health care workforce
Clinical relationships with dozens of colleges, career tech and high schools

In multiple communities; preparing young people with disabilities



Project SEARCH

Maintained an A Stable Rating

S&P Global
Ratings

INDUSTRY LEADERS
Otterbein Leaders serve on eight LeadingAge national and state boards and committees

Return of the Otterbein Olympics

**"Be bold,
be courageous,
be your best."**



Excellence



Member of The Green House Project™, a national non-profit organization founded on the belief that everyone has the right to age with dignity. GHP seeks to protect this right by de-stigmatizing aging and humanizing care through the creation of radically non-institutional elder care environments that empower the lives of people who live and work in them.

EAGLE Accreditation with Special Commendation.



20th in the Ziegler Top 200, a ranking of multi-site, not-for-profit, senior care organizations in the U.S.

17 Otterbein locations reached the four or five star target on quality measures in 2022.





**"Out with the old,
in with the bold."**

BOLD Fiscal Management

S&P Global

Otterbein has had an “A” category rating for the last 25 years – an “A-” for the first 15 years and a solid “A” for the last ten years as stated by S&P Global. It is this financial stability that has enabled Otterbein to reinvest in our mission which drives quality of care and permits expansion and improved amenities for those we serve.

Statement of Operation Year Ending December 31*

2021	2022	
\$ 169,897,514	\$ 203,758,496	Operating Revenues
\$ 6,877,231	\$ 4,294,132	CARE’s Act Revenue
\$(174,234,699)	\$(208,223,954)	Operating Expenses
\$ 2,540,046	\$ (171,326)	Operating Income (Loss)
\$ 1,439,770	\$ 1,706,090	Contributions & Gifts
\$ (231,025)	\$ (241,652)	Less Benevolent Care
\$ 21,439,896	\$ (619,959)	Investment Income Including Gains & (Losses)
\$ 4,594,065	\$ 0	Net Value of Affiliation
\$ 13,076,907	\$ 5,081,057	Change in Pension Activity
\$ (6,920,162)	\$ (7,210,610)	Other Income (Loss)
\$ 33,399,451	\$ (1,284,974)	Excess Revenues Over Expenses
\$ 5,091,397	\$ (44,655,975)	Unrealized Gain (Loss)
\$ 38,490,848	\$ (45,940,949)	Total Increase (Decrease) In Net Assets

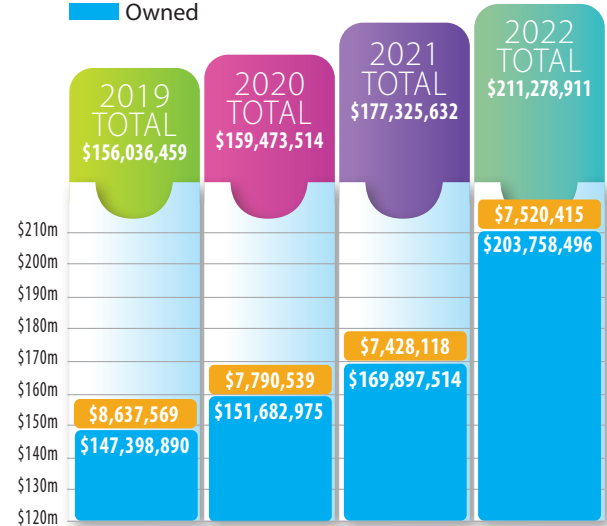
*Senior Living Operations

Balance Sheet Year Ending December 31

2021	2022	
\$ 256,101,348	\$ 206,560,028	Cash and Cash Equivalents - including Investments
\$ 17,380,994	\$ 22,356,878	Accounts Receivable
\$ 20,256,057	\$ 20,307,061	Other Current Assets
\$ 293,738,399	\$249,223,967	Total Current Assets
\$ 46,702,603	\$ 37,282,458	Investments and Reserves
\$ 343,851,917	\$ 345,273,374	Fixed Assets (Net of Depreciation)
\$ 32,621,522	\$ 33,233,679	Other Long Term Assets
\$ 716,914,441	\$665,013,478	Total Assets
\$ 37,098,335	\$ 36,678,034	Accrued Liabilities
\$ 10,432,506	\$ 12,213,162	Current Portion of Long-Term Debt
\$ 47,530,841	\$ 48,891,196	Total Current Liabilities
\$ 195,487,419	\$ 190,667,536	Long Term Debt
\$ 105,452,357	\$ 114,227,275	Deferred Revenues & Entrance Fees
\$ 17,122,023	\$ 7,157,011	Other Long Term Liabilities
\$ 365,592,640	\$360,943,018	Total Liabilities
\$ 39,222,227	\$ 32,550,236	Restricted Assets
\$ 312,099,574	\$ 271,520,224	Unrestricted Assets
\$ 351,321,801	\$304,070,460	Total Net Assets
\$ 716,914,441	\$665,013,478	Total Liabilities and Unrestricted and Restricted Assets

OPERATING REVENUE

■ Managed
■ Owned





Bold

Otterbein SeniorLife celebrated its 110th anniversary in 2022 and simultaneously created a new “Strategic Plan”

Strategic Plan

THE Place to Live

Provide a choice of quality living environments and enriched services to attract people to our SeniorLife Communities and Small House Nursing Neighborhoods, so that Otterbein is *THE Place to Live*.

THE Place to Work

Enrich the work environment to attract, provide optimal training and education and retain the best and brightest partners in caring, so that Otterbein is *THE Place to Work*.

THE Place for Extraordinary Care

Provide best in class, quality care solutions that exceed customer-driven medical demands and be recognized as *THE Place for Extraordinary Care*.

THE Place for a Fulfilling Future

Position Otterbein as historically relevant, resilient, celebrated and focused on growth and innovation, and therefore, as *THE Place for a Fulfilling Future*.

20



**“Living life bold
makes the best life
memories.”**

Bold Residents

The passion for life that Otterbein residents share is contagious! So many varied and talented people make Otterbein their home. Hearing things like “I haven’t been in a pool for 40 years and now I swim every day!” or “I’ve never painted in my entire life, and now I take weekly art classes and love painting,” is living proof of our mission in action. Enriching individual life journeys can be seen every day by residents sharing a passion they’ve had for many, many years, or learning something that they are newly passionate about.





**"Be bold.
Push yourself.
Get comfortable being
uncomfortable."**

Bold Partners

At Otterbein, we call ourselves “partners” instead of employees. This is based on our belief that together we are partners in caring. Our dedication, enthusiasm and strong support of the Otterbein mission is a key component of our success. Otterbein boldly partners with local educational institutions to offer clinical rotations in senior living. From grounds keepers, life enrichment directors, chefs, aides, housekeepers, nurses and so many more, these are the people our residents, patients and elders count on every day so that they can live a passionate life where their spirit knows no age.





**"There's nothing more
intoxicating than doing
big, bold things."**

Bold Leadership



Bill Brownson
Board Chair



Jill Wilson
President/CEO



Dan Arnold
VP Operations Neighborhoods



Catherine Chiovaro
VP Workforce Development



Chris Green
VP Finance

**"Taking bold,
focused action
creates explosive
results."**



Gary Horning
VP Marketing & Communications



Lynette Jagels
VP Information Technology



Jeff Kmet
VP Properties & Construction



Jason Miller
Senior Vice President



Lois Mills
VP Human Resources



Mel Miller
Previous Board Chair

Thank you
Mel for your
26 years of service to
Otterbein SeniorLife.



Kimberly Schmidt
VP Development



Pam Richmond
VP Strategy

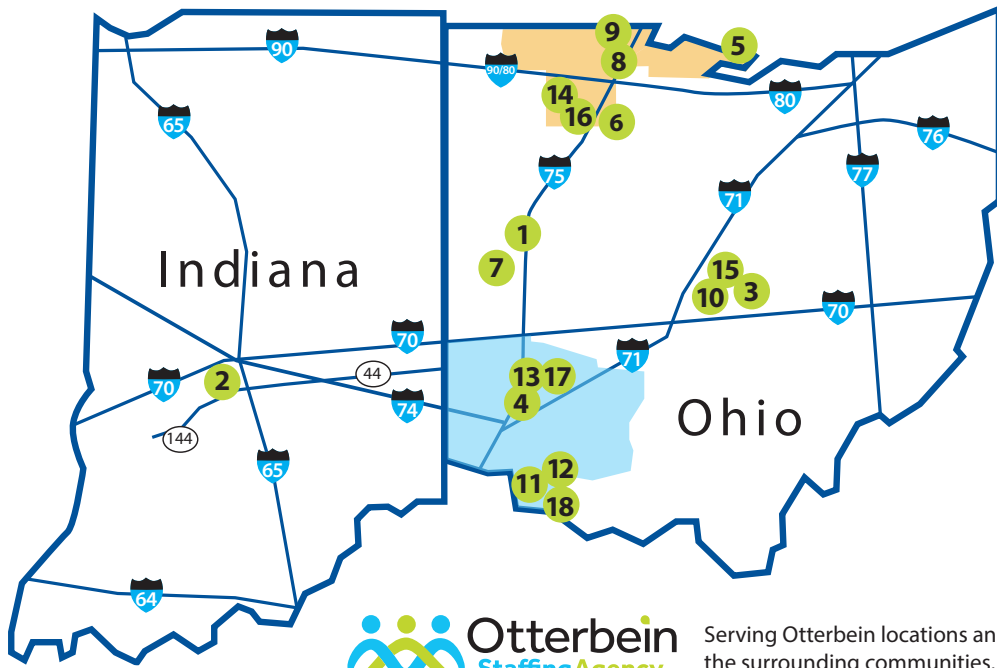


Nancy Ticherich
Director, Administrative and
Board Services



Emily Weikert
VP Clinical Quality

Serving Ohio and Indiana



Serving Otterbein locations and the surrounding communities.

SeniorLife Communities

- | | |
|----------------|------------------|
| 1 Cridersville | 6 Pemberville |
| 2 Franklin | 7 St. Marys |
| 3 Granville | 8 Sunset House |
| 4 Lebanon | 9 Sunset Village |
| 5 Marblehead | |

SeniorLife Neighborhoods

- | | |
|---------------|-------------------|
| 10 Gahanna | 15 New Albany |
| 11 Loveland | 16 Perrysburg |
| 12 Maineville | 17 Springboro |
| 13 Middletown | 18 Union Township |
| 14 Monclova | |

Home Health and Hospice

Blue shaded areas are regions served. Counties include: Butler, Clermont, Clinton, Fayette, Greene, Hamilton, Highland, Montgomery, Preble and Warren.

Otterbein Ashanti Hospice

Orange shaded areas are regions served. Counties include: Fulton, Lucas, Ottawa and Wood.



Be Bold. Be You. Be Otterbein.



www.otterbein.org



All photos are of actual Otterbein residents and partners.