Happiness Has a Home Here

2021–2022 Annual Impact Report

SERVING SENIORS
A Message to Our Supporters

Dear Friends,

After the past two and a half years, it’s hard to believe that Serving Seniors began as a humble operation, serving 60 lunches a week in the basement of a church to a small group of low-income seniors. More than five decades later, our organization has grown to meet the changing needs of our community’s most disadvantaged seniors—during a time of unprecedented challenges.

This past fiscal year was defined by perseverance and determination. At times the pandemic appeared to be over, only to emerge once again with new variants and health risks. Our flagship facility, the Gary & Mary West Senior Wellness Center, finally reopened and seniors began to return after more than a year of isolation. Our concern for their well-being only grew as we saw the realities of heightened poverty and delayed care. Yet we persisted, facing every new challenge so we could deliver much needed care and services to seniors when they needed us most.

Throughout the year, despite the uncertainty, Serving Seniors kept doing what we do best: showing up for seniors in poverty. In the last fiscal year, Serving Seniors provided more than 1.4 million meals (page 7); advocated for groundbreaking senior housing legislation to prevent homelessness (page 15); and introduced a senior emergency assistance fund to alleviate poverty by providing rental and basic needs assistance (page 11).

Without you, our community of supporters, none of our achievements would be possible. Your generosity inspired us, and we hope the following report inspires you as well. Thank you for being among our valued friends and partners as we continue to create a better reality for San Diego’s low-income seniors.

With gratitude,

Paul Downey
President & CEO
On July 15, Serving Seniors reopened our flagship facility, the Gary & Mary West Senior Wellness Center, after 481 days of closure. The Senior Wellness Center, a cornerstone of our service model, provides a lifeline of support to thousands of low-income and unhoused seniors through daily meals, health visits, case management, housing assistance, activities, and social events.

Many clients visited the Wellness Center every day for years before it closed on March 12, 2020. The loss of a stable, trusted place to go each day was devastating, and the reopening restored our clients’ sense of purpose and productivity. Seniors finally reunited with friends that hadn’t seen in over a year. For unhoused seniors, the reopening allowed them to sit down for a hot meal, use a clean restroom, or escape the heat on a hot day.

Serving Seniors took every precaution to keep seniors safe and healthy. We are proud to report there were zero COVID-19 infections.

Meet Julieta

Every time Julieta visits our Gary and Mary West Senior Wellness Center, she has to take two different buses and two trolleys.

The commute takes her a few hours - but for Julieta, it’s worth every second. “I love it here. When I come here I forget about all my problems.”

During the height of the COVID-19 pandemic, Julieta dealt with the crippling effects of social isolation and missed seeing her friends and socializing on a regular basis. As a diabetic with high blood pressure and vertigo, she’s also dealing with many high-risk medical concerns.

Julieta connected with a Serving Seniors Case Manager, and she now gets support to stay up to date on her healthcare and maintains a healthy diet through our meal program.

“Serving Seniors has changed my whole life,” Julieta said. “I love the meals, and I have a lot of friends here. I like to use the computer rooms.”
 Nutrition

No one should have to worry about where their next meal will come from – especially our elderly neighbors. That’s why Serving Seniors’ Senior Nutrition Program is the beating heart of our mission.

We deliver nutritious meals 365 days a year to low-income seniors regardless of their ability to pay. As the pandemic stretched on, we ensured that our community’s most vulnerable seniors had a nutritious meal delivered to their door or a welcoming environment to enjoy a meal with other seniors. Our meals keep seniors healthy, independent, and connected to a caring community.

FY22 Highlights

- Exceeded 16 million meals served for the past 50 years.
- Introduced a new frozen meal program for low-income seniors
- Held the Older Americans Act 50th Anniversary Celebration with Mayor Todd Gloria. More than 100 seniors joined us in the dining room, where Mayor Gloria served meals and presented a proclamation to honor Serving Seniors’ commitment to serving low-income seniors.

By the Numbers

Seniors Fed: 5,878
Meals Served: 1,407,576

Improved health and wellness for 60%
Made fewer visits to the doctor for 42%
Increased knowledge of nutrition and healthy eating habits for 74%

Meet Richard

Palms sweating and heart beating quickly, Richard sat in the doctor’s office. It was his least favorite day of the year – the day of his annual visit. It seemed like he had been waiting hours for his lab results. Then his doctor finally walked in and pronounced, “Your lab work is exceptional!”

Richard couldn’t believe it. He was a fan of candy, especially chocolate, but he knew he made a conscious effort to follow a healthy diet and avoid processed foods. “I attribute these results to Serving Seniors nutrition program,” Richard said. “It’s mainly fruits and vegetables and you get a balanced diet that you can maintain.”

At 81 years old, Richard was able to improve his overall health, adjust his eating habits and downsize his daily medications due to the nutritious diet he receives through the Serving Seniors meal program.

Richard said he loves the variety of meal choices Serving Seniors provides and enjoys the way the food is prepared. “I like the chicken, beef, the meatloaf,” Richard said. “Serving Seniors cooks it the way it should be. They don’t use a lot of salt and because of that I don’t have high-blood pressure.”
All seniors deserve to live in a comfortable home where they feel supported and safe. That’s why last year, Serving Seniors provided 597 low-income seniors with secure, independent housing, including transitional housing for unhoused seniors, and permanent supportive housing with onsite services, including meals and case management. Our housing services ensure that low-income seniors can age with dignity and provide a caring, supportive community that helps prevent senior homelessness.

**By the Numbers**

- Affordable Units: 412
- Transitional Units for Homeless Seniors: 30
- Seniors Housed: 597
- Housing case management visits: 8,138
- Transition housing graduates who moved to permanent housing: 83%

**Outcomes Achieved**

- Increased housing security for: 82%

**Meet Joe**

After being physically assaulted on the street, Joe began sleeping outside the Gary & Mary West Senior Wellness Center. He had been homeless for months and was in chronic, intense back pain that worsened while sleeping on the concrete downtown. After his medication was stolen, he started sleeping in a wheelchair every night.

Joe got connected to our Transitional Housing Program, where he was added to the waiting list and provided with case management services. At this point, Joe could barely walk and could no longer sleep on the hard ground for fear of not being able to get back up. He also was afraid of being attacked again. Serving Seniors explored many avenues to try and get Joe off the streets and into emergency housing with no successful outcome.

That’s when Serving Seniors approved an emergency motel stay to help with his mental health and physical challenges. He was in a desperate state, and we knew a Transitional Housing Program unit would be available shortly. As it turned out, the unit became available just three days after he checked out of the motel. Joe called our case manager to express his gratitude for being housed by Serving Seniors. He began to take care of his pain/medical issues and worked with staff to achieve his independent living goals. In January 2022, Joe secured permanent affordable housing and moved into his own apartment.
Low-income seniors often have trouble accessing healthcare and other necessary services to lead healthy and independent lives. Without a network of support, most are at high risk of poor health outcomes and losing their independence. That’s why Serving Seniors’ team of health specialists, social service case managers, and care coordinators provide integrated health and social services at sites across San Diego County. Whether seniors need help accessing their health benefits, getting a vitals check, or coordinating transportation, our staff offers compassionate care and supportive assistance.

Meet Pamela

“I have nowhere to go.” These were the words that crossed Pamela’s mind after she was laid off from her bus driver job at the airport due to COVID. This job was not only her routine the last few years, but her safety net and her source of a stable income.

Keeping her head high, Pamela, 69, did everything she could to stay on her feet. While relying on unemployment and struggling to get by, she connected with Serving Seniors and moved into Potiker Family Senior Residence.

Since living here, Pamela’s life has changed for the better and she has been able to receive critical support from Serving Seniors at a time when she was in desperate need. When Pamela’s car was ticketed and her car registration came up for renewal, she was worried she’d lose her housing.

Through our Senior Emergency Assistance Fund, Pamela was able to pay her parking fines, car registration, and was still able to make her rent payments. “Without Serving Seniors, I’d be on the streets,” Pamela said. “I’m now calm... I know if I need help, they will help me.”

Today, Pamela is back working at the airport. She gets healthy meals in the dining room and participates in the activities at Serving Seniors’ Potiker Family Senior Residence. Pamela was able to use the Senior Emergency Assistance Fund when she was in crisis. “I finally feel safe,” Pamela said. “I don’t feel alone, which I never expected.”
Enrichment and Activities

Exercise, play, learning, and social connection are essential ingredients to healthy aging. That’s why, in addition to meeting basic needs, Serving Seniors hosted more than 800 engaging activities and enrichment opportunities that brought fun and connection into the lives of low-income seniors. Because of the pandemic, many seniors didn’t leave their homes for over a year. Serving Seniors was deeply concerned, and the Volunteers & Activities team worked diligently to bring meaningful programming that lifted our clients’ spirits and encouraged creativity, learning, and movement.

FY22 Highlights

- Serving Seniors built a robust Activities program.
- Launched a General Store where seniors could “shop” for essential basic needs items at no cost.
- Hosted 394 fitness and wellness activities, allowing seniors to stay active through weekly exercise.

By the Numbers

<table>
<thead>
<tr>
<th>Activities provided</th>
<th>Average number of seniors participating each month</th>
<th>Improved social connection for</th>
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<tbody>
<tr>
<td>878</td>
<td>752</td>
<td>72%</td>
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Meet Vivian

Vivian, 65, a regular at our Gary and Mary West Senior Wellness Center, never thought of herself as a senior. She initially discovered the Senior Wellness Center when looking for places to take her mom. During COVID, Vivian and her mom stayed at home for over a year and felt isolated from the world. They began eating lunch daily in the dining room and building relationships with the other seniors and staff. “The Wellness Center became our saving grace.”

While her mom was busy in the CyberCafe, Vivian discovered there were classes and activities she could participate in to help her physical and mental wellness. “I really enjoy participating in the Walking Group and classes every week,” Vivian said. “It has helped me make friends and feel fit during the COVID-19 pandemic.”

Vivian is now one of our most enthusiastic participants and is known for her contagious “attitude of gratitude.” She participates in bingo, our Civic Engagement Group, and performed an aerobic dance routine for our talent competition, Senior Idol. Even more inspiring, she encourages other clients to join in and welcomes them with open arms. “I’m extremely grateful for Serving Seniors and everyone here.”
In 2020, Serving Seniors embarked on a year-long Homelessness Needs Assessment to better understand San Diego’s senior homelessness crisis. Our findings revealed the causes of senior homelessness are distinct from the general unhoused population and gave us a road map to advocate for effective, sustainable solutions. We are proud to report the many advancements we made this past year to end senior homelessness in San Diego County and create lasting systemic change.

Rental Assistance:
- The San Diego County Board of Supervisors unanimously approved a motion to develop and implement a pilot shallow rental subsidy program for low-income seniors. The $3 million pilot program will provide $500 a month to 220 seniors to help them avoid homelessness over 18 months.
- The San Diego City Council voted this past June to include the Housing Stability Fund in the city’s fiscal year 2023 budget. Over the next two years, the pilot project will provide up to $500 a month to 300 low-income households (including seniors).

Both projects were developed based on the recommendations made in our Needs Assessment after we found that seniors needed as little as $300 per month to avoid homelessness.

IMPROVED SOCIAL SUPPORTS:
Gerontological Training for Service Providers

One of the key findings of our Needs Assessment was that only 45% of San Diego’s homeless service providers have experience working with older adults or receive specialized training.

This past year, Serving Seniors, in coordination with the County of San Diego’s Aging and Independent Services (AIS), developed an “Aging Resources 101” training package for homeless service providers to improve care for unhoused seniors. After a successful pilot, AIS will conduct trainings for shelter providers and other organizations providing services to unhoused seniors later this year.

To access the full report, please visit our website at: www.servingseniors.org
On October 2, 2021, Serving Seniors celebrated the organization’s 50th+1 anniversary, Paul Downey’s 25th as President & CEO, and the 10th year of the Gary & Mary West Senior Wellness Center!

After postponing our celebration twice due to the COVID-19 pandemic, we were so happy to finally get together at the Marriott Marquis San Diego Marina and celebrate 50+ years of service! Guests dined under the stars and enjoyed a moving program highlighting Serving Seniors’ many accomplishments over the past five decades. The night concluded with an unforgettable concert featuring Rock and Roll Hall of Fame guitar legend Don Felder, formerly of the Eagles.

Thanks to our Honorary Chairs Gary and Mary West, and past board chair Molly Cartmill who led our steering committee, the night was an overwhelming success—raising a record-breaking $525,000 net income for seniors in poverty.

Thank you to all our gala guests, sponsors, and supporters who made the evening so memorable.
**Statement of Financial Position**

**Assets**

- **Current Assets**
  - Cash & cash equivalents: $5,516,006
  - Investments: $1,574,792
  - Other receivable: $479,332
  - Grants receivable: $1,319,364
  - Pledges receivable: $712,665
  - Accounts receivable—related parties, net: $127,010
  - Prepaid expenses and other: $237,181
  - Total Current Assets: $9,966,350

- **Noncurrent Assets**
  - Notes receivable, net: $11,499,734
  - Land, building & equipment, net: $8,386,288
  - Investments in limited partnerships: $501,477
  - Investments restricted for endowment: $750,000
  - Beneficial interest in endowment funds: $8,384
  - Total Noncurrent Assets: $21,145,883

**Liabilities and Net Assets**

- **Current Liabilities**
  - Accounts payable: $108,014
  - Payroll & related liabilities: $84,079
  - Accrued paid time off: $274,309
  - Total Current Liabilities: $466,402

- **Noncurrent Liabilities**
  - Notes payable: $2,200,000
  - Total noncurrent liabilities: $2,200,000

**Net Assets**

- **Without donor restrictions**
  - Undesignated: $15,288,207
  - Board designated: $2,908,708
  - Total Net Assets Without Donor Restrictions: $18,196,915

- **With donor restrictions**
  - Purpose restrictions: $39,308
  - Time restrictions: $9,451,224
  - Perpetual in nature: $758,384
  - Total net assets with donor restrictions: $10,248,916

**Total Net Assets**

- $28,445,831

**Total Assets**

- $31,112,233

**Total Liabilities and Net Assets**

- $31,112,233

**Statement of Activities**

**Revenue, Support and Gains**

- **Government Grants**: $8,655,919
- **Contributions**: $3,488,239
- **Housing**: $700,540
- **In Kind Contributions**: $651,600
- **Other Income**: $46,599
- **Investment income (loss), net**: ($179,316)
- **Special Events**
  - Special events revenue: $762,994
  - Less cost of direct benefits to donors: ($59,500)
  - Special events revenue, net: $703,494
- **Donations from seniors served**: $108,688
- **Rental income**: $43,622

- **Total Revenue, Support and Gains**: $14,219,385

**Expenses**

- **Program Expenses**
  - Nutrition Program: $7,828,099
  - Health & Social Services: $1,877,783
  - Housing Development & Facility Support: $1,273,477

- **Total Program Expenses**: $10,979,359

- **Supporting Services**
  - Management & General: $860,257
  - Fundraising: $1,115,019

- **Total Supporting Services**: $1,975,276

- **Total Expenses**: $12,954,635

**Change in Net Assets**

- $1,264,750

**Net Assets at Beginning of Year**

- $27,181,081

**Net Assets at End of Year**

- $28,445,831
Our Supporters

Thank you to the generous individuals, foundations, and corporations who made our work possible with their gifts to Serving Seniors during FY22 (July 1, 2021 – June 30, 2022).

$100,000+
Esther Fischer
Mary Ellen and Jerry Harris
The JMS Fund
Marge and Neil Schmale
Sempra Energy Foundation
Mary & Stanley Smith Charitable Trust
Gary and Mary West Foundation

$50,000 – $99,999
Barbara Brown
Price Philanthropies
The Shiley Foundation

$25,000 – $49,999
Alliance Healthcare Foundation
Becton Dickinson – BD
Community Congregational Development Corporation (CCDC)
County of San Diego
Grossmont Healthcare District
Grace Hawkes
The Peggy and Robert Matthews Foundation
Jori Potiker
Julie and Lowell Potiker
Qualcomm Incorporated
The San Diego Foundation
SCAN Health Plan
Ellen and Bob Svatos
Carole and Jerry Turk
MUFG Union Bank Foundation
Donna Van Ert

$10,000 – $24,999
Anonymous
Kayla Baker and Ajit Viswanathan
Mary Gendron and Craig Perkins
The Giv4 Homelessness Fund of the Jewish Community Foundation
Alicia and Fred Hallett
Hervey Family Non-endowment Fund
Dawn and Michael House
Hyder Property Management Professionals
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San Diego Downtown Breakfast Rotary Club
San Diego Seniors Community Foundation
Schwartz Semerdjian Cauley & Evans LLP
Senior Resource Group
Claudia and Simon’ Silva
Deceased
Slalom
Jill Summer
US Bank
BJ and Steve Utgard
Carol and Neil Vandersvall
Nancy Vaughan
Carey Wall
Diana Weiss-Wisdom and Gabriel Wisdom

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Heather Rosing and Scott Carr
Linda Runyoen
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San Diego Gas & Electric (SDG&E)
Sue Schaffner
Renee Schoen
Elissa Siendelganz and Peter Wujek
Denise Semler
Sam Sherman
Woon-Wah Sui
Heidi and David Skinner
Anne Marie Smith and Mike Feusers
Shari and Rick Smith
Tracy and Rudy Spano
Karyn Speidel
St. Paul’s Senior Homes & Services
Erick and Matt Strauss
Scott Strauss
Jennifer and Tim Sutton
Elizabeth Swanson
The Leigh Tison Charitable Trust
TVSA SD3 Teens Volunteers in Action
Sheila and James Tyler
Joy and Rick Vaccari
Nancy Volin
Vien and Scott Walker
Rosemary Wang
Tang Wang
Carol and Craig Whitwer
Rosa Williams
Anne Wilson
Nancy Wilson
Lenora Wirt
Gretchen and Tom Yager
Kate and Kevin Zimmer

Please accept our apologies for any inadvertent misprints, omissions, or errors in this listing.
Please contact Kasi Holl at kasi.holl@servingseniors.org or (619) 467-1070 so we can make the corrections. Thank you!
Volunteers make our mission come to life. From serving meals in our congregate dining rooms to hosting senior birthday parties, every part of our work is made possible because of the dedicated individuals and groups that choose to give back to Serving Seniors. In FY22, our volunteers returned in overwhelming numbers and took the starts and stops of the pandemic in stride. At a time when seniors felt unsettled and forgotten, their presence, smiles, and willingness to help made an enormous impact.

Volunteers

Volunteer Hours: 732
Value of Volunteer Time: $469,143

Corporate & Civic Volunteer Groups: 33

FY22 Highlights

- Interns from e3 Civic High returned this spring semester and helped our Volunteers & Activities staff weekly at the Senior Wellness Center.
- Corporate and civic groups including US Bank, Boundless Bio, and the San Diego Bar Association hosted monthly birthday parties and served meals in our dining room.

By the Numbers

Volunteers
Corporate & Civic Volunteer Groups
Volunteer Hours
Value of Volunteer Time

Source: Independent Sector. 2021 Value of Volunteer hours in California is $35.56.
Leaving a bequest to Serving Seniors ensures that at-risk older adults receive life-saving services in the future. Your legacy will make this possible.

The following suggested bequest language may help you and your professional advisor plan a meaningful gift so seniors live happy and fulfilling lives.

“I hereby give, devise, and bequeath __________ and No/100 dollars ($DOLLARS) to Serving Seniors, a nonprofit organization located at 525 14th Street, Suite 200, San Diego, CA, 92101, Federal Tax ID #95-2850121, for Serving Seniors’s general use and purpose.”

For more information on including Serving Seniors in your estate planning, please contact Dave Ricks at (619) 487-0734 or dave.ricks@servingseniors.org.