



Annual Impact Report 2022-2023

SERVING
SENIORS

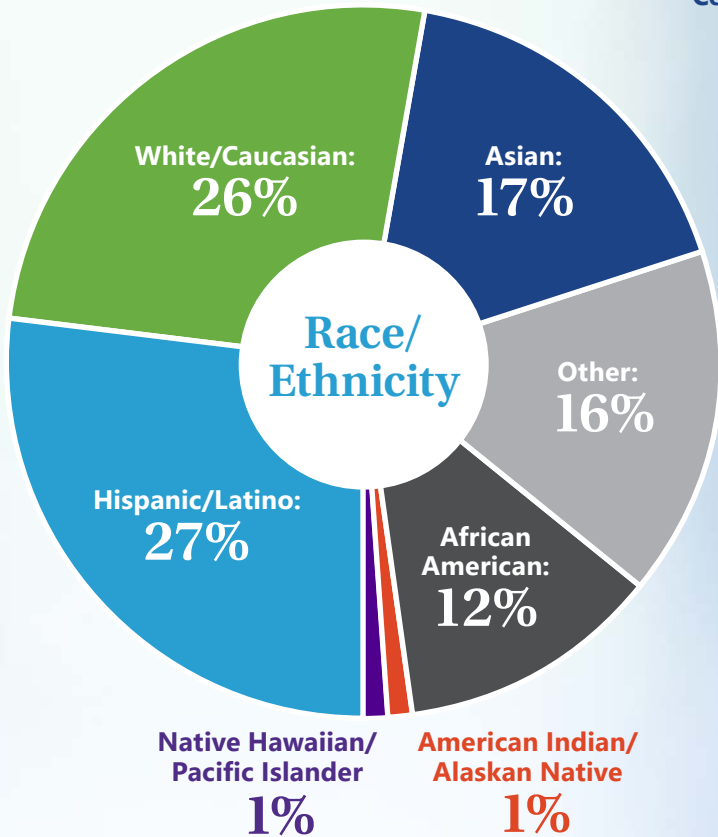
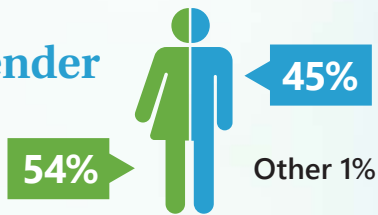
HAPPY
LIVES
HERE

By the Numbers

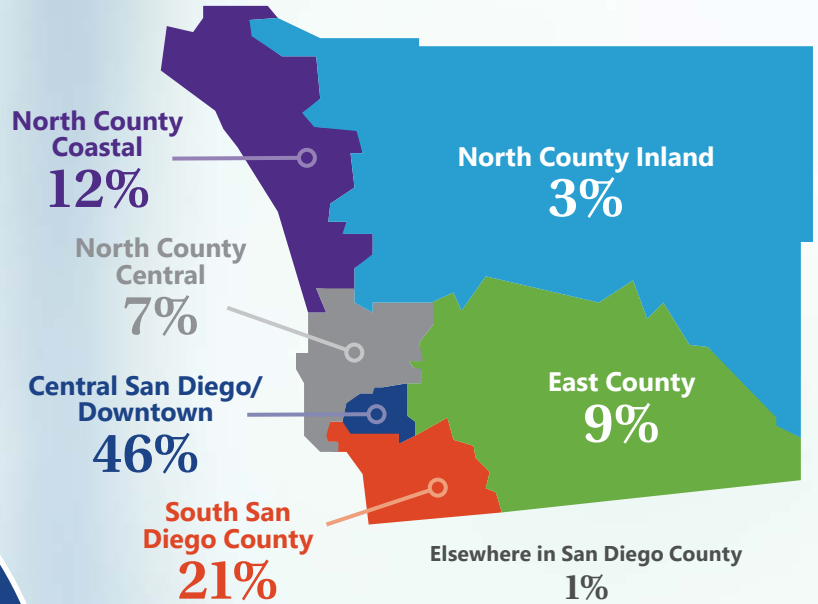
Unduplicated Seniors Served

9,185

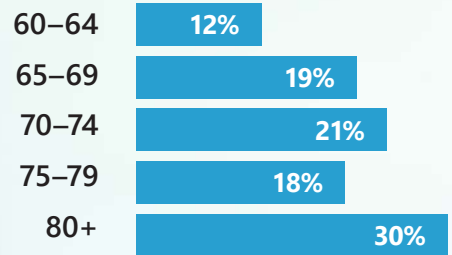
Gender



Where Our Clients Live



Age



Military/ Veterans

17%

Median Income
\$1,182/month

Below the
Federal Poverty
Level
86%

A Message to Our Supporters

Dear Friends,

Serving Seniors has been a beacon of hope for San Diego's low-income seniors for over half a century. What started as a humble operation has evolved to meet the increasingly complex needs of our community's older adults. Much has changed over the past five decades, but throughout our journey, we have kept our clients at the center—honoring their dignity and offering practical care at every turn.

Over this past year, Serving Seniors made good on our promise to tackle the biggest threat to health for low-income seniors: stable housing. Our groundbreaking 2021 Needs Assessment gave us a clear path forward, revealing the challenge of older adult homelessness and effective, humane solutions. In FY23, we took action, implementing a range of innovative programming to address San Diego's growing senior homelessness problem. We did this on several fronts to ensure unhoused seniors received age-friendly care and to prevent seniors from becoming homeless for the first time. Although, at times, the task felt daunting, we are making an impact and seeing results (page 6). The crisis is far from solved, yet we remain fortified by our clients, whose resilience and strength keep us going. As one Wellness Center client powerfully stated, *"I'm homeless but not broken because of you."*

While we made significant strides in housing, we remained persistent in our mission to meet the immediate needs of seniors in poverty. In the last fiscal year, Serving Seniors served more than 1.1 million nutritious meals (page 7), provided over 19,000 health and case management visits (page 9), and opened the doors to our fourth housing residence (page 4).

As we reflect on the significant accomplishments and breakthroughs we made, we are deeply grateful for your partnership, which has transformed the lives of our clients. Thank you for everything you do to help San Diego's low-income seniors. Together, we are creating a brighter and healthier future for San Diego's seniors.

With gratitude,



Mary Gendron

Mary Gendron
Chair, Board of Directors



A handwritten signature in blue ink, appearing to read "Paul Downey".

Paul Downey
President & CEO

Housing Matters

Housing matters. Seniors need to have housing to take care of their health. It's that simple. That's why this past year, Serving Seniors advanced several initiatives designed to address the root causes of senior homelessness outlined in our groundbreaking **Homelessness Needs Assessment**. San Diego seniors need housing solutions now, and we're pleased to report on the concrete actions taken on their behalf.

Bridge Shelter

Seniors need shelter environments that can accommodate their age-related needs. In December 2022, Serving Seniors teamed up with the City of San Diego to open and operate **Seniors Landing Bridge Shelter**, a 33-room non-congregate facility and the region's first shelter dedicated to older adults experiencing homelessness.



Shallow Rental Subsidies

Small, monthly rent subsidies are one of the most effective and economical ways to avoid evictions and prevent senior homelessness. Thanks to transformational grants from Community Congregational Development Corporation (CCDC) and the Lucky Duck Foundation, Serving Seniors provides rental subsidies and case management services to low-income seniors paying 60% or more of their monthly income towards rent.

Growth and Making a Difference

Seniors must have a safe place to call home—a home they can afford and nurtures community.

That's why Serving Seniors is committed to developing affordable housing for low-income seniors.



On November 14, 2022, Serving Seniors celebrated the grand opening of our fourth affordable housing residence, Harris Family Senior Residence, in City Heights. This brand new 117-unit complex, named in honor of our philanthropic investors, the Harris Family, features one-bedroom/one-bath apartments with full kitchens and includes onsite social services, a community garden, fitness classes, and social activities.

Serving Seniors marked this momentous occasion with a ribbon-cutting ceremony alongside our incredible supporters, Chelsea Investment Corporation and Price Philanthropies, and San Diego Mayor Todd Gloria.





Nutrition

At Serving Seniors, a meal shared in the company of friends can make all the difference for senior health. That's why the Serving Seniors' Senior Nutrition Program is still the beating heart of our mission and central to our innovative model of wraparound care. Served at congregate dining sites throughout San Diego County and delivered to the doors of homebound seniors, our nutritious meals are a lifeline of sustenance for seniors living in poverty. Our meals keep seniors nourished and connected to a caring support network.

FY23 Highlights

- Surpassed 17 million meals served.
- Opened a new congregate dining site in Imperial Beach.
- Increased congregate dining participation by 93%.

By the Numbers

Seniors Fed	Improved food security for
6,653	73%
Increased knowledge of nutrition and healthy eating habits for	
74%	

Total Meals Served
1,145,899

Home-Delivered & To-Go Meals
735,955

Congregate Meals
115,028

Frozen Meals
294,916

Meet R'Lorraine

R'Lorraine has been experiencing homelessness well before the summer months. With no stable place to take shelter, her energy and resources were depleted. The heat made it worse, and she recalled her friend telling her about the Gary & Mary West Senior Wellness Center. It felt like it was time to see what this place had to offer.

R'Lorraine arrived at the Wellness Center and what she found went beyond her expectations. From the welcoming nature of the staff to the sense of safety she'd been missing, R'Lorraine felt like she was part of a family. She couldn't believe a place like this existed and now she comes to the Wellness Center every day to escape.

While the building provides shelter itself, R'Lorraine has found more inside the walls of Wellness Center to be thankful for. She is now able to enjoy two meals a day in our congregate dining room, which has given her back energy she didn't have before. The meals restored her spirit and provided her the physical uplift she desperately needed.





Health and Social Services

Every day in our community, low-income seniors struggle to access care and the social support vital to healthy living. Seniors in poverty suffer higher rates of disabilities and untreated chronic illnesses and risk losing their independence without assistance. That's why Serving Seniors' team of health educators and social service case managers delivered a range of supportive services at sites across San Diego County, providing health education, vitals checks, benefits access, emergency assistance, and other forms of care that kept seniors healthy and independent.

FY23 Highlights

- Established health education partnerships with Scripps Health and Sharp Healthcare.
- Partnered with the County and Live Well San Diego to host Love Your Heart events at all our sites, providing free blood pressure checks and heart health education.

By the Numbers

Health and Social Service Visits

19,426

Seniors Served

2,375

Outcomes Achieved

Gained access to community resources

73%

Excellent or good health reported by

71%

Ability to successfully manage their health

91%

Meet Robert

When Serving Seniors first spoke to Robert, 78, he was living in a skilled nursing facility and very much wanted to return home. Disabled and without family, he knew he needed help. After 16 months, Robert finally returned to his apartment downtown and immediately contacted his Serving Seniors case manager for support. He was set up with home-delivered meals and connected to a health educator for a primary care doctor referral.

When our health educator followed up by phone the next day, Robert reported that he had fallen but was "OK." Robert requested someone check in on him several times a week while he adjusted to being back on his own. In the meantime, our case manager worked to identify support services so that he could live independently.

When Robert's case manager visited, she discovered his fall was much worse than he had initially reported. Robert severely injured his head and arm. Our health educator sprang into action, booking an appointment with his doctor and advocating for him to be seen by a specialist. Robert ended up needing X-rays, a cast, and ongoing treatments. Meanwhile, our case manager secured 61 hours of in-home care so Robert could recover at home.





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Enrichment and Activities

An active lifestyle and social connection are essential for our health, especially for older adults. Sadly, low-income seniors often miss out on this critical part of wellness because of economic constraints and isolation. That's why Serving Seniors hosted over 1,000 activities and enrichment opportunities last year that gave low-income seniors valuable opportunities to move, learn, play, and enjoy life to the fullest—all while making lasting connections.

FY23 Highlights

- Introduced new fitness classes, including Zumba, Bone-building, and Cardio Drumming.
- Partnered with the County of San Diego to build senior gardening programs at housing sites.
- Hosted two major cultural events for the Chinese community: the Moon Festival and Chinese New Year.

By the Numbers

Activities provided

1,014

Average number of seniors participating each month

1,022

Improved social connection for

75%

Meet Terrie

A regular at our Gary and Mary West Senior Wellness Center, Terrie is the first to raise her hand and participate in Serving Seniors' activities and events. A previous contestant on Senior Idol, Terrie entertained the crowd with her energetic lip-syncing and dancing performance.

But her real passion is art. When she heard Serving Seniors' Senior Art Contest Artopia was back this year, she quickly got to work, creating a masterpiece from her heart. **"I worked really hard on this,"** Terrie said.

"It took me almost four months to finish it."

"This painting represents the story of my life," Terrie said.

"I have where I live on here and even the Wellness Center."

After the Artopia Art Gallery closed, winners were announced for photography, hand-created, and painting/drawing categories. As the Award Ceremony began, Terrie sat there nervously hoping her name would be called. Suddenly, it was time for the Painting/Drawing winner to be announced.

"The winner is Terrie!", the MC announced and Terrie suddenly froze, tears of joy running down her face.

"I'm just so happy," Terrie said. **"I'm hoping to have my art displayed in a city of San Diego building."**





Volunteers

Volunteers are at the heart of everything we do.

Whether serving meals to our clients at dining sites or joining seniors for a walk around the block, Serving Seniors' volunteers bring our mission to life every day. In FY23, our volunteers became more engaged than ever, finding new ways to enrich our clients' lives—teaching seniors to play chess, educating clients about exotic locations around the globe, or hosting a coloring class, just to name a few. These generous individuals and groups' extraordinary dedication and service make a world of difference to our clients.

FY23 Highlights

Serving Seniors' new Senior Volunteer Ambassador Program offered monthly training and community-building exercises that encouraged volunteerism among our clients—helping low-income and unhoused clients find hope and a purpose.

By the Numbers

Volunteers

1,209

Source: Independent Sector: 2022 Value of Volunteer hours in California is \$37.32.

Corporate & Civic Volunteer Groups

53

Volunteer Hours

17,747



Our Supporters

Thank you to the generous individuals, foundations, and corporations who made our work possible with their gifts to Serving Seniors during FY23 (July 1, 2022 – June 30, 2023).

\$100,000+

Anonymous
James Silberrad Brown Foundation
Community Congregational
Development Corporation (CCDC)
Esther Fischer
Neal and Marge Schmale
May & Stanley Smith Charitable
Trust
Gary and Mary West Foundation

\$50,000 – \$99,999

Hervey Family Non-Endowment
Fund at The San Diego Foundation
Life Science Cares
Price Philanthropies Foundation
The Shiley Foundation
US Bank

\$25,000 – \$49,999

Alliance Healthcare Foundation
Alumbra Innovations Foundation
Becton Dickinson – BD
Mary Gendron and Craig Perkins
Jori Potiker
Lowell and Julie Potiker
Qualcomm
San Diego Seniors Community
Foundation
Josiah and Abbie Sand Trust Estate
Carole and Jerry Turk
Donna Van Ert

\$10,000 – \$24,999

Anonymous
Rob Borthwick and Lee Parnell
The Elizabeth Lowen Fund
Doug and Rosanna Forsyth
Samuel H. French and Katherine
Weaver French Fund
The giv4 homelessness Fund of the
Jewish Community Foundation

Grossmont Healthcare District
Fred and Alicia Hallett
Grace Hawkes
Hyder Property Management
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Sydney and Brian Johnson
Nordson Corporation Foundation
Eric and Kathy Olsen
Omaha Community Foundation
Pacific Western Bank
Allison and Robert Price Family
Foundation
RCP Block & Brick Inc.
TRIO Community Meals
Neal and Carol Vandewalle
Wells Fargo Foundation
Perry and Ann Wright

\$5,000 – \$9,999

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Dennis Arriola and Janet Winnick
Deb and Todd Barrett
Benefit Pro Insurance Services
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Richard and Genevieve Harris
HomeStreet Bank
Michael and Dawn House
Steve Koura
KPMG LLP
Mothers and Daughters Club
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(MADCAPS)

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Charles and Susan Muha
Oceanside Community Foundation
Ken and Linda Olson
Arlene and Ron Prater
Gerald and Christa Reynolds
Randall Sanner
Jim and Kelly Sikora
Slalom
Tim and Jennifer Sutton
Robert and Ellen Svatos
Kathryne and Richard Thorpe
Nancy L. Vaughan
Kris and Fran Virtue
Morgan and Brenna Wood

\$2,500 – \$4,999

Anonymous
Gloria Banuelos and John Comito
Sheila Baran and Larry Fadden
William and Jennifer Beamer
Ellen Benkle
Robert and Lois Bernstein
Best, Best & Krieger LLP
Susan Boyle and Gary Sanders
Barbara Brown
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Elizabeth Keadle
Christian and Autumn Kelly

Shirley King and Arthur Olson
Divya and Shawn Koura
John Krakauer Charitable Trust
Matthew and Joanna Larson

\$1,000 – \$2,499

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Albertsons Companies/Vons
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Allianz Global Investors
Jennifer Allyn and Eric Ganci
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Meredith Barnes
Barona Band of Mission Indians
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Michael and Cindi Harris
Sally Harris

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Andrew and Rebecca Howat
Tracy Hudson
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Matthew and Erin Huls
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Nora Jaffe
Kent Johnson and Gina Purlia
Johnson
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Judith Kay and Paul Towsley
Julia Kelety
Michael and Patricia Kelly
Josephine Kiernan
Mary King
Tamera Kohler
Richard and Barbara Kurz
La Jolla Quaker Meeting
George and Carol Lattimer
The Leigh Tison Charitable Trust
Jack and Judy Leshefka
Diana Long
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Greg and Julianne Markow
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Richard Rachel and Annette Lau
Iain Reilly
Dave Ricks
N.J. Rodi
Patricia Roscoe
Heather Rosing and Scott Carr
Kenneth and Sari Rudy

San Diego Chinese Women's
Association (SDCWA)
San Diego Downtown Breakfast
Rotary Club
San Diego Gas & Electric (SDG&E)
San Diego Gulls
Bonnie Sattler
Sue Schaffner
Sam Sherman
Rick and Shari Smith
Rudy and Tracy Spano
Allison Stewart
Scott Strauss
Sundt Foundation
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Craig and Carol Whitwer
Rosa Williams
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David Workman
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George and Janice Muller Fund
Steven and Cynthia Nelson
Elaine M. Phillips
Arthur P. & Jeanette G. Pratt
Memorial Fund
Richard Heath & Associates
SANDAG
Deborah Senkier and Joel
Greenberg
Martha Shively
Danielle Strazzo
Jill Sumner
Jennifer Tsoulos
University Christian Church
Stephen and BJ Utgard
Via Healthcare Consulting
Anne Wilson
Katy Young
... and many others!

*Please accept our
apologies for any inadvertent
misspelling, omissions, or errors in this listing.
Please contact Kaia Hill at kaia.hill@servingseniors.org or
(619) 487-0701 so we can make the corrections. Thank you!*

Financials

Statement of Financial Position

Assets

Current Assets

Cash & cash equivalents	\$5,129,317
Investments	\$1,682,874
Grants receivable	\$2,030,986
Accounts receivable—related parties, net	\$198,300
Other receivable	\$14,931
Pledges receivable	\$192,105
Rent receivable	\$13,917
Accrued interest receivable	\$11,513
Prepaid expenses and other	\$291,375
Total Current Assets	\$9,565,318

Noncurrent Assets

Restricted reserves	\$430,152
Notes receivable, net	\$2,964,705
Land, building & equipment, net	\$27,569,854
Operating lease right-of-use asset, net	\$44,326
Investments in limited partnerships	\$270,846
Investments restricted for endowment	\$750,000
Beneficial interest in endowment funds	\$8,670
Total Noncurrent Assets	\$32,038,553

TOTAL ASSETS **\$41,603,871**

Liabilities and Net Assets

Current Liabilities

Accounts payable	\$273,704
Payroll & related liabilities	\$132,954
Tenant security deposits	\$28,800
Accrued paid time off	\$262,537
Other liabilities	\$102,669
Deferred revenue	\$38,966
Current portion of operating lease liability	\$8,076
Current portion of mortgage payable	\$59,860
Total Current Liabilities	\$907,566

Noncurrent Liabilities

Notes payable	\$2,200,000
Operating lease liability, net of current portion	\$36,244
Mortgage payable, net of current portion	\$1,398,572
Accrued interest payable	\$9,070
Total Noncurrent Liabilities	\$3,643,886

TOTAL LIABILITIES **\$4,551,452**

Net Assets

Without donor restrictions	
Undesignated	\$32,939,430
Board designated	\$2,369,890
Total net assets without donor restrictions	\$35,309,320

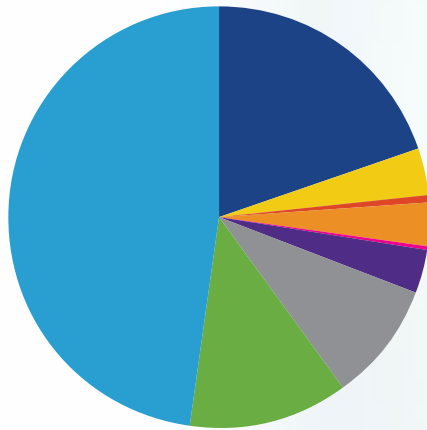
With donor restrictions	
Purpose restrictions	\$471,094
Time restrictions	\$513,335
Perpetual in nature	\$758,670
Total net assets with donor restrictions	\$1,743,099

Total Net Assets **\$37,052,419**

TOTAL LIABILITIES AND NET ASSETS **\$41,603,871**

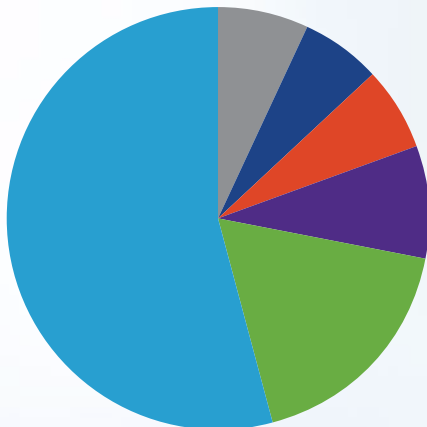
Statement of Activities

Revenue, Support and Gains



● Government Grants	\$8,662,733
● Contributions	\$2,211,227
● Housing	\$1,690,594
● In Kind Contributions	\$610,200
● Other Income	\$136,316
● Special Events	
<i>Special events revenue</i>	\$686,639
<i>Less cost of direct benefits to donors</i>	(\$70,000)
Special events revenue, net	\$616,639
● Donations from seniors served	\$100,225
● Laundry & Vending Income	\$1,831
● Rental income	\$653,401
● Investment Income	\$3,533,714
Total Revenue, Support and Gains	\$18,216,200

Expenses



Program Expenses	
● Nutrition Program	\$8,109,062
● Health & Social Services	\$2,655,278
● Housing Development & Facility Support	\$1,307,499
● Rent and Real Estate	\$955,399
Total Program Expenses	\$13,027,238
Supporting Services	
● Management & General	\$919,398
● Fundraising	\$995,378
Total Supporting Services	\$1,914,376
Total Expenses	\$14,942,014

Change in Net Assets	\$3,274,786
Net Assets at Beginning of Year	\$33,777,633

NET ASSETS AT END OF YEAR **\$37,052,419**

How Will You Leave Your Legacy?



Leaving a bequest to Serving Seniors ensures that at-risk and homeless adults receive life-saving services in the future. Your legacy will make this happen.

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

If you are considering making a bequest of a percentage of your estate to Serving Seniors, we recommend the following language:

“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' 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@servingseiors.org.

What is the Legacy Circle?

The Legacy Circle is a very special group of supporters who have named Serving Seniors in their estate plan. Serving Seniors realizes that Legacy Circle members have choices when making their charitable contributions, and we are deeply honored and grateful that they have selected Serving Seniors as a member of their "family" in their estate plan. The following donors have joined the Legacy Circle and we thank them for their impactful generosity.

Barbara Brown
Leslie Bruce
Tana and Dan Cleaves
Kate Engler
Dale and Don Goldman
Charlotte Jensen

Arlene and Ron Prater
Martha Shively
Marge and Neal Schmale
Kathryne and Rich Thorpe
Mark Sweeney
Nancy Vaughan



Barbara Brown included Serving Seniors in her estate plan because ***"They are frugal on how donor dollars are spent, which benefits more seniors. They are continually supporting older adults in a multitude of ways, including getting them off the streets." was an easy decision for me to make.***



Mark Sweeney says ***"What they have accomplished over the years in building the organization into what is today, to me, is truly remarkable. Making Serving Seniors a major beneficiary of my Trust was an easy decision for me to make."***

FY24 Board of Directors

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Community Volunteer

Bobby LaCour, Finance Chair
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Joni Low, Governance Chair
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Kris Virtue
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This information is not intended as legal, tax or investment advice. Serving Seniors does not endorse one professional advisor over another. We recommend that you seek appropriate legal or tax counsel as it relates to your own estate and financial planning objectives.



SERVING
SENIORS

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(619) 487-0701
www.servingseniors.org

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