

SERVING
SENIORS | CELEBRATING
50
YEARS



Annual Impact Report 2019-2020

by the numbers

Unduplicated seniors served

8,021

↑ 44% from FY19

Race/ethnicity (of those who reported)

White/Caucasian: 33%

Hispanic/Latino: 23%

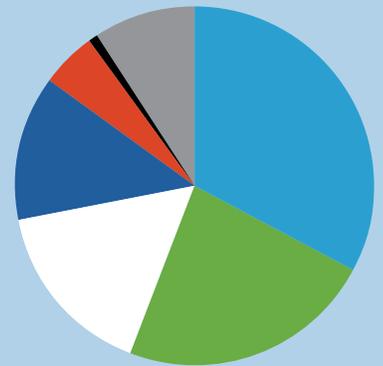
Black/African American: 16%

Asian: 13%

Native Hawaiian/Pacific Islander: 5%

American Indian/Alaskan Native: 1%

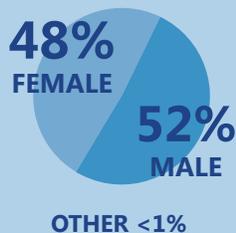
Other: 9%



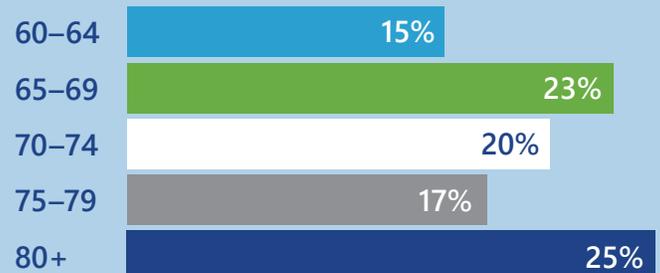
Military veterans



Gender



Age



Median income

\$1074/month

Below the federal poverty level

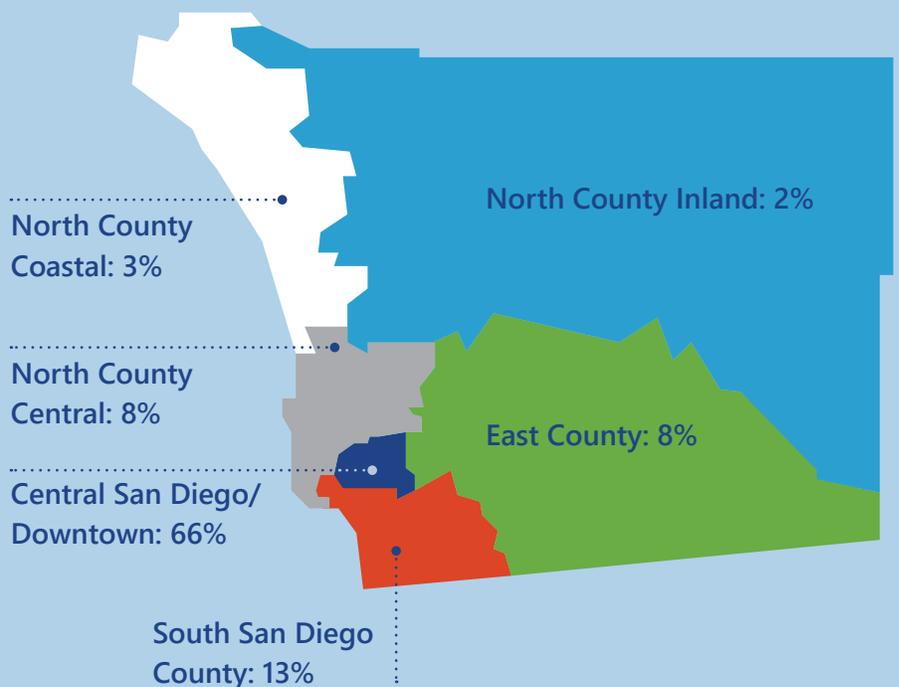


Clients who are homeless

11% 

Where our clients live

GREATER SAN DIEGO AREA



a message to our supporters

Dear Friends,

When we envisioned our 50th anniversary year, we never imagined it would bring so much change to our community and our organization.

As a nonprofit known for providing wraparound services to low-income seniors under one roof, senior centers such as our Gary & Mary West Senior Wellness Center are fundamental to what we do and how we reach our clients.

So when the County of San Diego ordered all senior centers to close due to COVID-19, we knew we were up against one of the biggest challenges in our 50-year history. A core element of our service model had ground to a halt overnight, and yet our seniors were in greater need than ever before—in need of nutritious food, housing where they could shelter in place, health support and COVID testing, and safe ways to stay connected.

In order to keep delivering on our vital mission, we had to do things differently than we had for 50 years—and fast.

We're proud to say that Serving Seniors rose to that challenge. In a matter of days, we more than tripled our home-delivered meals (page 2), implemented new socialization programs (page 4), and adapted our wraparound model to a socially distanced world (pages 6-7), all while meeting the needs of a 44 percent increase in clients.

But none of this would have been possible without you, our generous supporters. It's our great pleasure to present the following report as a testament to all you've made possible. We thank you for your partnership, and look forward to celebrating our 50th anniversary in 2021!

With gratitude,



Lina Ericsson
Chair, Board of Directors



Paul Downey
President & CEO



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Community Volunteer

nutrition

For the last 50 years, our Nutrition Program has been the beating heart of our wraparound model, providing delicious congregate and home-delivered meals to seniors across San Diego County. We were already on track for significant growth when the pandemic hit, causing demand for our meals to skyrocket. Altogether, we went from serving 59,000 to nearly 175,000 meals a month, and fully transitioned to a combination of home-delivered, to-go, and shelf-stable meals after congregate sites closed due to COVID-19. These meals helped keep local seniors nourished and healthy at a time when it was needed most.

FY20 HIGHLIGHTS

- Increased the number of meals served by 48%.
- Expanded home-delivered meal program and implemented to-go and shelf-stable meals in response to COVID-19.

BY THE NUMBERS

Meals served

956,475

Congregate: 181,393

Home-Delivered & To-Go: 653,177

Shelf-Stable: 121,905

Seniors fed

7,342

Increased food security for

92%

Increased health and wellness for

73%

Reduced healthcare costs for

39%

MEET ANTHONY



A former chef for Qualcomm Stadium, Anthony knows the value of good food. Thanks to our congregate meals, not only does he worry less about where his next meal is coming from, but thanks to his new healthy diet, he has gone from 350 pounds down to 270 over three years. Anthony says, "**The nutritional value that Serving Seniors offers us is spot on.**"

Due to his chronic illnesses, Anthony has been in isolation since the start of the pandemic. With congregate dining rooms closed, he was nervous about how he was going to eat—until he learned that Serving Seniors would be delivering meals straight to his door. "**I felt like I wasn't alone, I felt like I had some support, and somebody cared. The biggest support is knowing that you're not going to go hungry.**" •

housing

Affordable housing is one of our seniors' biggest needs. But with COVID-19 posing critical health risks for older adults who can't isolate at home, the need for housing has become even more urgent. That's why we placed 500 homeless and housing-insecure seniors in homes last year, including free transitional housing units and permanent affordable housing with on-site supportive services. By ensuring that low-income seniors had a stable place to call home, we provided shelter from the pandemic and the comfort of something constant in an uncertain world.

FY20 HIGHLIGHTS

- Increased the number of seniors housed by 12%.
- Broke ground on new affordable housing project (see page 9).

BY THE NUMBERS

Affordable units

412

Transitional units for homeless seniors

22

Seniors housed

500

Housing case management visits

4,601

Transitional housing graduates who moved into permanent housing

83%

MEET PHYLLIS



When her husband left, Phyllis, a new retiree, found herself unable to make ends meet. She eventually became homeless, and lived out of her car and storage unit for more than three years. Phyllis explains, "**You don't know where you are going to use the bathroom. You don't know when you're going to be able to take another shower. I don't wish that on anybody.**"

She was having lunch at our Gary & Mary West Senior Wellness Center when she learned about our housing programs. After meeting with a Housing Navigator, she was placed in a temporary unit and later transitioned into our Potiker City Heights Residence. After years of homelessness, she finally has a safe, affordable place to call home once again. "**I feel so grateful for what Serving Seniors did for me. It transformed my life for the better.**" •

health + social services

For more than a decade, Serving Seniors' nurses, social workers, and care navigators have provided an array of integrated health and social services to address low-income seniors' wraparound wellness needs. This year, to maintain access to support services and social connection from the safety of our seniors' homes, we implemented COVID screenings, telephonic nursing and social services, a telehealth program with our community partners, and a new Connections Program, which links older adults with a trained volunteer for regular, friendly phone calls to check in, listen, and chat.

FY20 HIGHLIGHTS

- Expanded access to health and social services through virtual visits.
- Established new Connections Program.

BY THE NUMBERS

Health and social service visits

8,548

Blood pressure checks

594

Seniors served

1,483

Increased knowledge of chronic health conditions and how to prevent them for

90%

Increased health and wellness for

73%

MEET LEONARD



For Leonard, every penny counts, so he was excited to learn that CalFresh benefits were becoming available to seniors for the first time. He applied for the benefit, but kept receiving confusing letters saying he needed to provide more information. He had just about given up when he met with our social worker, who assisted him through the process and helped him obtain the benefit, increasing his access to nutritious food.

Since the start of the pandemic, Leonard has stayed in touch with the Health & Social Services team, receiving COVID testing and meeting with our registered nurse to check in on his health. The care and support he receives from Serving Seniors marks a major shift from the years he spent homeless and alone.

"I'm thankful for the countless little things that I can use to extend my years and make them more gratifying," he says. "I feel content, and that's the way a person should feel at my age." •

enrichment + activities

Health isn't just about eating right and following your care plan. It's also about keeping your mind sharp, your body fit, and your spirits bright. This year, we offered numerous ways for seniors to stay active and engaged, from fitness classes to lifelong learning to our successful Civic Engagement Group, which trains older adults as community advocates for senior-friendly public policy. Our enrichment opportunities not only promote vibrant, fulfilling lives, but prevent the loneliness and isolation that can come with age.

FY20 HIGHLIGHTS

Civic Engagement Group testified at City Hall and secured 500 signatures in support of the Mt. Etna Redevelopment Project, to provide 117 units of low-income senior housing.

BY THE NUMBERS

Activities provided

918

Improved social health for

78%

Increased friendships for

92%

MEET MARY



A resident at San Diego Square, Mary has been a familiar face around the Gary & Mary West Senior Wellness Center for more than six years. She loves getting involved in all that the Wellness Center has to offer. She is a regular at our exercise and travel classes, Cyber Café, and bingo. She loves celebrating with her friends at the monthly senior birthday party, and even volunteers to help sweep and clean tables in the kitchen and dining room. Mary says, **"When you get older your life becomes monotonous. Coming here makes me feel fulfilled and excited."**

Although the Wellness Center is temporarily closed, Mary is happy to know that she will have a fun and welcoming place to come back to. **"Serving Seniors has made my life richer." ●**

COVID-19 response

The **COVID-19 pandemic** has changed all our lives, but for seniors, staying home and socially distancing is a matter of life and death. According to the Center for Disease Control, adults aged 60 and over are at the highest risk of serious consequences from COVID-19, and on March 12, 2020, the County of San Diego closed all senior centers indefinitely.

As an organization known for transforming senior centers into a one-stop shop for wraparound services, we had to work quickly to reimagine our model and deliver meals, support, and health services not under one roof, but under the roofs of thousands of seniors now sheltering at home. Here are just a few of the ways Serving Seniors took action to care for our older adults through this unprecedented time.



Transitioning Our Meal Delivery Model

When COVID-19 shuttered our congregate sites, we worked around the clock to not only transition our existing nutrition clients to home-delivered meals, but to meet the needs of thousands more requesting services for the first time. Overnight, we began offering **to-go meals** at the Gary & Mary West Senior Wellness Center. Soon we had more than tripled our Home-Delivered Meal Program and launched a new **shelf-stable meal option**, with boxes prepared largely by volunteers and delivered to seniors' homes.

Expanding Access to Virtual Health Services

The majority of Serving Seniors' health and social services are provided at our flagship Gary & Mary West Senior Wellness Center. With the center temporarily closed since March 2020, we set up "**outdoor offices**" to conduct face-to-face case management visits, implemented new **telephonic health and social services**, and partnered with UCSD Health and West Health Institute to provide **telehealth screenings** with real emergency-room doctors.

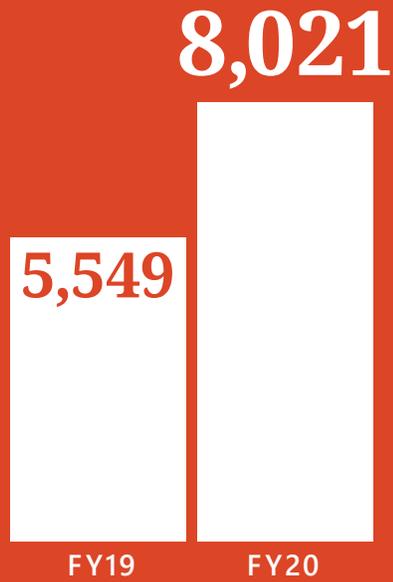
Fighting Social Isolation

While sheltering at home, seniors are at increased risk of social isolation, which can lead to high blood pressure, heart disease, anxiety, and depression. To prevent isolation and its negative health effects, Serving Seniors launched a new **Connections Program**, which engages volunteers to provide **supportive calls** to socially isolated seniors. During three weekly check-in calls, seniors have an opportunity to chat, connect with another human being, and seek assistance from our Health & Social Services team.



more care, *delivered*

+44%
seniors
served



BEFORE COVID-19
Clients visit senior centers for care



DURING COVID-19
We deliver care to clients



nutritious meals
health and social services
socialization

+240%
meals
delivered
to homes



volunteers

Volunteers have always been indispensable to our mission, but this year they became even more so, helping us meet the needs of thousands of new clients looking to Serving Seniors for assistance. From serving congregate meals to packing shelf-stable food boxes and even making calls to lonely seniors, our dedicated volunteers played a critical role in ensuring that vulnerable seniors were fed, cared for, and able to thrive every day of the year.



FY20 HIGHLIGHTS

- Volunteers played an integral role in providing shelf-stable meals and check-in calls to seniors.
- Volunteers from UCSD engaged our seniors in an Intergenerational Garden Clean-Up project, helping to spruce up the courtyard garden at Potiker Family Senior Residence (photos shown at left).

BY THE NUMBERS

Volunteers

576

Corporate volunteer groups

25

Volunteer hours

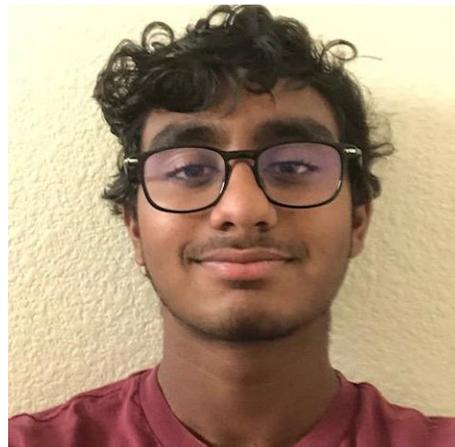
7,636

Value of volunteer time

\$240,610

Source: Independent Sector.
2019 Value of Volunteer hours
in California is \$31.51.

MEET ANIRUDH



A local high school student and varsity tennis player, Anirudh found himself struggling after his grandfather passed away. Unable to visit him due to COVID travel restrictions, Anirudh and his family had relied on the kindness of healthcare professionals to care for him in his final days. As Anirudh searched for closure, the thought came to him: what better way to

pay tribute to his grandfather than to pay forward the kindness he received to a senior in need?

That's when Anirudh found Serving Seniors' new Connections Program and was paired with a senior named Debbie. Through their regular calls, he helped Debbie cope with sadness, provided reassurance, and worked with our case managers to get needed supplies delivered to Debbie's home. Soon Anirudh realized how much they had in common, including that Debbie used to play tennis when she was young too.

Anirudh says the Connections Program helps more than just seniors: **"I feel like it has also helped me. It is a blessing and I am grateful to have this opportunity!"** •

highlights

Mid-City Groundbreaking

On June 10, 2020, Serving Seniors broke ground on its fourth affordable housing residence. Situated at the corner of Fairmount Avenue and El Cajon Boulevard in City Heights, this innovative, intergenerational development will provide 117 one-bedroom senior apartments with supportive services. Price Philanthropies is developing a further 78 apartments for low-income families and has contributed vital funding.

The senior residences will be conveniently located across the street from the Copley-Price Family YMCA, near several bus stops and other amenities, with one-bedroom senior apartments ranging from approximately \$750 to \$1,200 a month.

The project is expected to open mid-2022.



Top: Rendering of Mid-City Family Intergenerational Residences

Middle: Rendering of a typical residence interior

Bottom: Breaking ground at the site

Left: Aerial view of the site for the Mid-City Senior & Family Intergenerational Residences

financials

Statement of Financial Position

July 1, 2019 - June 30, 2020

Assets

CURRENT ASSETS

Cash and cash equivalents	\$2,562,893
Investments	\$1,226,274
Grants receivable	\$1,766,873
Pledges receivable	\$58,800
Accounts receivable—related parties, net	\$95,989
Prepaid expenses and other	\$223,551
Accrued interest receivable	—
Notes receivable	—

Total Current Assets **\$5,934,380**

NONCURRENT ASSETS

Pledges receivable, net	\$49,256
Notes receivable, net	\$11,499,734
Land, building and equipment, net	\$8,156,781
Investments in limited partnerships	\$501,331
Investments restricted for endowment	\$750,000
Beneficial interest in endowment funds	\$7,316

Total Noncurrent Assets **\$20,964,418**

Total assets **\$26,898,798**

Liabilities and Net Assets

CURRENT LIABILITIES

Accounts payable	\$994,250
Payroll and related liabilities	\$276,317
Accrued paid time off	\$216,707
Deferred revenue	\$699,200
Accrued interest payable	—
Notes payable	—

Total Current Liabilities **\$2,186,474**

NONCURRENT LIABILITIES

Notes payable	\$2,200,000
Share of deficiency in limited partnerships	\$14,939

Total Noncurrent Liabilities **\$2,214,939**

Total liabilities **\$4,401,413**

NET ASSETS

Without donor restrictions	\$12,154,947
With donor restrictions	
<i>Purpose restrictions</i>	\$268,116
<i>Time restriction</i>	\$9,317,006
<i>Perpetual in nature</i>	\$757,316
Total with donor restriction	\$10,342,438

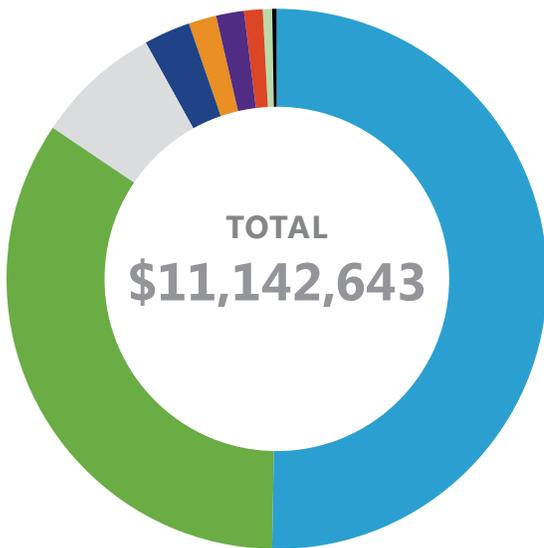
Total Net Assets **\$22,497,385**

Total liabilities and net assets **\$26,898,798**

Statement of Activities

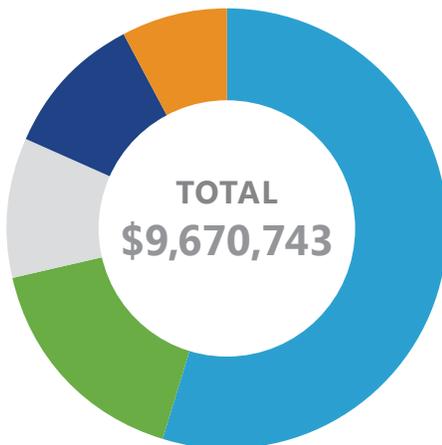
July 1, 2019 - June 30, 2020

REVENUE, SUPPORT AND GAINS



Government grants	\$5,623,675
Contributions	\$3,789,333
Housing	\$854,504
Special events	
<i>Special events revenue</i>	<i>\$317,560</i>
<i>Less: Cost of direct benefits to donors</i>	<i>—</i>
Special events revenue, net	<u>\$317,560</u>
Investment income	\$182,596
Donations from seniors served	\$159,783
In-kind contributions	\$122,400
Other income	\$52,970
Rental income	\$39,822
Net assets released from restrictions	—
Total Revenue, Support and Gains	\$11,142,643

EXPENSES



Program Services	
Nutrition program	\$5,309,720
Health and social services	\$1,613,074
Housing development and facility support	\$982,096
Total Program Services	<u>\$7,904,890</u>
Supporting Services	
Management and general	\$1,038,311
Fundraising	\$727,542
Total Supporting Services	<u>\$1,765,853</u>
Total Expenses	\$9,670,743

Change in net assets	\$1,471,900
Net assets at beginning of year	\$21,025,485
Net assets at end of year	<u>\$22,497,385</u>

our supporters

Thank you to the generous individuals, foundations, and corporations who made our work possible with their gifts of \$1,000 and above to Serving Seniors in the 2019–2020 fiscal year.

If you have any questions about your listing, please contact us at 619-487-0701 or kaia.hill@serving seniors.org

\$500,000+

Una Davis
Gary and Mary West Foundation

Allison and Robert Price Family Foundation
Qualcomm Incorporated
MUFG Union Bank Foundation

The William and Ruth Tippet Foundation
U.S. Bank
Andy and Suzan Young

Solar Turbines–Caterpillar Foundation
Michelle Sterling and Mark Palamar
Jill Sumner

\$100,000–\$499,999

The JMS Fund
Price Philanthropies
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Darlene Marcos Shiley
The May & Stanley Smith Charitable Trust

SCAN Health Plan
Carol Sivets
Jerry and Carole Turk

\$5,000–\$9,999

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The California Wellness Foundation
Esther Fischer
Hervey Family Non-Endowment Fund at The San Diego Foundation
Potiker Family Foundation
The San Diego Foundation
Sempra Energy
The Eugene Vaisberg Charitable Fund
Jerry and Donna Van Ert

\$10,000–\$24,999

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County of San Diego, Neighborhood Reinvestment

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\$25,000–\$49,999

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\$1,000–\$2,499

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Craig and Carol Whitwer
Rosa Williams
Nancy Wilson
Anne Wilson

Serving Seniors' 50th Anniversary Sunshine Gala

SAVE THE DATE

We weren't able to celebrate this year as we had planned, but we look forward to bringing you a very special semicentennial gala in 2021.

Please join us for a beautiful evening of hope and happiness as we commemorate 50 years of helping seniors in poverty live healthy, fulfilling lives and raise funds to support our vital services.

SEPTEMBER 30, 2021

Marriott Marquis San Diego Marina
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San Diego, CA 92101

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