

ANNUAL IMPACT REPORT 2023-2024



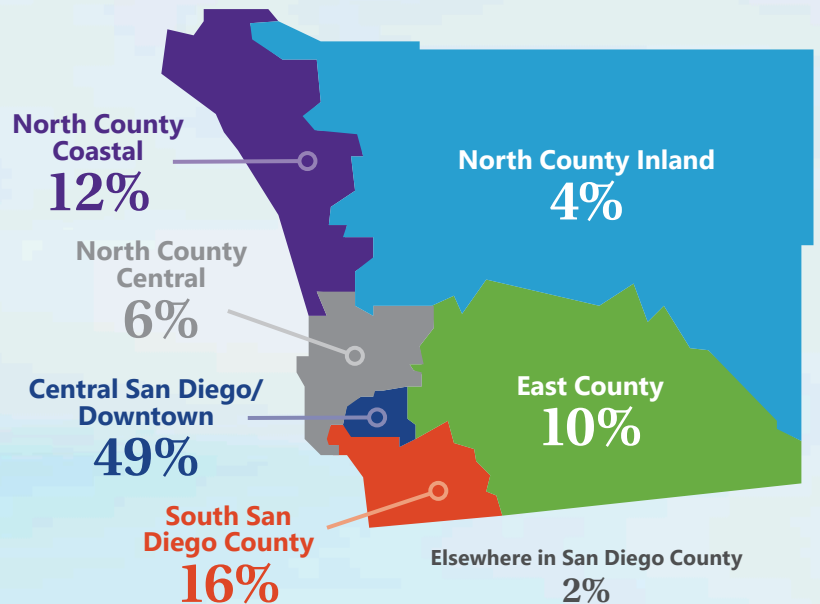
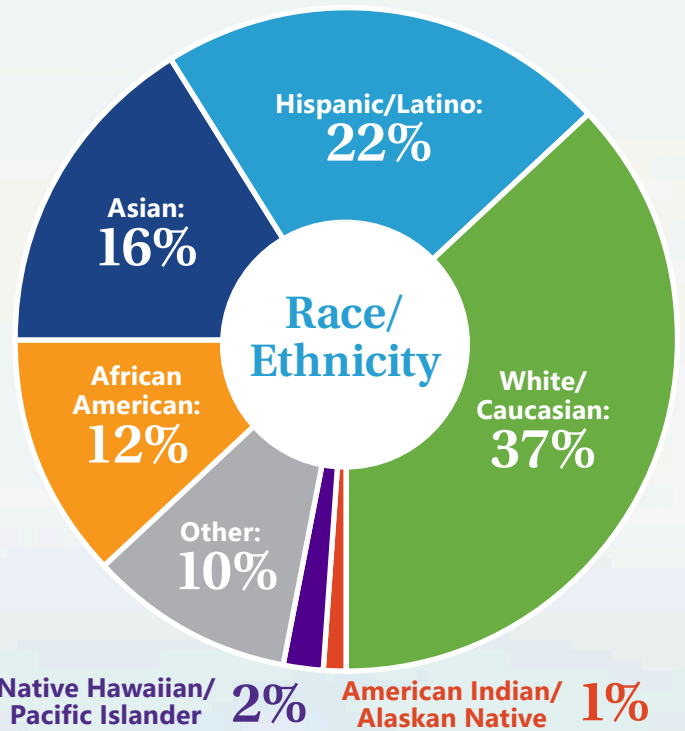
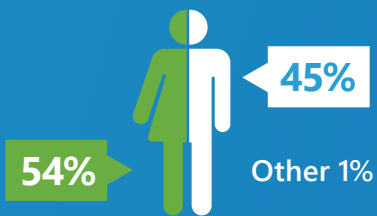
SERVING
SENIORS

HAPPY
LIVES
HERE

By the NUMBERS

Unduplicated Seniors Served
10,765

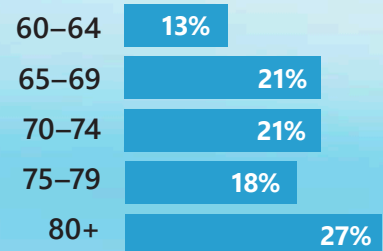
Gender



Median Income
\$1,125/month

Below the Federal Poverty Level:
88%

Age



A MESSAGE to Our Supporters

**Dear FRIENDS
and SUPPORTERS,**

New, energizing experiences and ways of seeing the world make our days memorable.

For all of us at Serving Seniors, there has never been a more exciting time in our half-century of service devoted to supporting San Diego's low-income older adults.

As the needs have grown more urgent and more complex, Serving Seniors has risen to the challenge to meet these needs. It requires us to evolve our thinking, seek innovative solutions, and keep up with the dynamics of this changing population.

While there are profound changes since we first opened our doors, our mission has never changed: keeping our clients at the heart of everything we do, respecting the humanity and dignity of every individual. No one is a number or a statistic at Serving Seniors.

In our FY 24 annual report, Serving Seniors has much to celebrate. Grounded in the findings from our Needs Assessment, we are pursuing practical and humane solutions to better meet the challenge of older adult homelessness.

In large part, it means rededicating our resources to prevention efforts. It is far more humane and cost-effective to address the causes of homelessness and root them out before anyone finds themselves unhoused. We have support from our elected and community leaders, helping make new prevention programs including shallow rental subsidy programs a reality.

We also acknowledge that senior homelessness remains a daunting problem. Ensuring unhoused seniors receive age-friendly care while we work toward permanent solutions is vital, including increased access to affordable housing. Our long-awaited development in Clairemont, including a new senior center, is nearly a reality, opening in early 2025.

Annual reports allow us to step back from our day-to-day efforts and reflect on our mission to meet the immediate needs of seniors in poverty. In the last fiscal year, Serving Seniors provided 75 seniors with rental subsidies (page 7), served more than 1.1 million nutritious meals (page 8), and provided over 19,000 health and case management visits (page 10).

Our accomplishments represent the partnerships and support for our work. You are changing lives on a daily basis. We couldn't be more grateful, but the work is far from done.

With our thanks,



Mary Gendron
Mary Gendron
Chair, Board of Directors



Paul Downey
Paul Downey
President & CEO



A MISSION to IMPROVE the LIVES of San Diego's Older Adults in Poverty

Our mission comes to life with the work Serving Seniors
does every single day.

Serving Seniors helps older adults in poverty live healthy and fulfilling lives using a successful model of whole-person, wraparound support including meals, housing, health and social services, and enrichment activities. As a leading provider of services to low-income and unhoused seniors, Serving Seniors knows that poverty-related issues are complex, interrelated, and require a coordinated approach. We work in the homes of hundreds of homebound seniors and across numerous sites in the county to transform and support the lives of older adults in need.

In our 54-year history, Serving Seniors has grown to over 100 employees who provide inclusive, person-centered access to supportive and compassionate services for over 10,000 older adults living in poverty.

Meet RICHARD

"My experience at the Serving Seniors has been nothing but extraordinary! When I arrived, I was greeted by a friendly staff and signed up for programs that pointed me in the direction I needed to go. This was a place that has many resources, especially for the homeless that are 60+ years of age."

Richard, age 61, has been coming to Serving Seniors' Gary and Mary West Senior Wellness Center for over a year while experiencing homelessness. Sleeping outside the Wellness Center at night, he came in each morning finding a safe place to rest and enjoy a warm meal. He began working with a case manager.

Richard began volunteering in the dining room. It made him feel useful, and he was able to accomplish a positive thing that day. He is now proud to be a Serving Senior Volunteer Ambassador. *"It's a way of representing what this place is all about – a safe place for elders,"* said Richard.

After being on the waiting list for housing since last summer, Richard's case manager shared the exciting news about an opening for him at a transitional housing unit. He now has his own place.

"At the end of the day, I know when I go back (home), I'm able to take a shower like a normal person. Just the shower alone is like a billion dollars. Just knowing that you're able to get cleaned up and lay down without having to worry about who's walking by is an invaluable feeling," said Richard.



Housing, Health, HOPE

Safe and affordable housing is fundamental to health. San Diego County's unhoused and housing-insecure older adults need immediate assistance to stop the rise of senior homelessness and ensure access to age-friendly housing they can afford and sustain.



By the NUMBERS

- **77** seniors provided with transitional housing
- **75** seniors received Shallow Rental Subsidy through the Lucky Duck Foundation and the Community Congregational Development Corporation (CCDC)
- Over **600** seniors accessed affordable, permanent housing

FY24 HIGHLIGHTS

of Seniors Landing Bridge Shelter

- **28** seniors currently enrolled
- **129** older adults housed since opening in 2023
- Served **190** clients since opening
- **90%** placement to permanent affordable housing

Bridge Shelter

Serving Seniors partners with the City of San Diego to operate the region's first shelter dedicated to older adults experiencing homelessness. Seniors Landing Bridge Shelter, a 33-room non-congregate facility, is a model program that works to place clients in permanent housing. The City of San Diego has extended our contract and lease of the facility.

Transitional Housing

Serving Seniors' Transitional Housing Program (THP) helps seniors exit homelessness by providing transitional housing and supportive services as a pathway to permanent affordable housing.

Shallow Rental Subsidies

Through funding from the Lucky Duck Foundation and in collaboration with the San Diego Housing Commission, Serving Seniors' Safe at Home pilot program provides rental subsidies and case management services to low-income seniors. Small, monthly rent subsidies are one of the most effective and economical ways to avoid evictions and prevent senior homelessness.

Permanent Housing

Without an abundance of affordable housing and services for low-income seniors, the senior homelessness crisis will only get worse. Serving Seniors broke ground on June 29, 2023 to build our fifth affordable housing residence for seniors in San Diego's Clairemont neighborhood.



NUTRITION

It Starts with a Meal

A consistent diet and proper nutrition are fundamental to healthy aging and positive health outcomes. When it comes to staying healthy, we believe there's no better medicine than a hot, delicious meal in the company of friends. Our Senior Nutrition Program remains the beating heart of our wraparound system of care. Served at seven congregate dining sites throughout San Diego County and delivered to the doors of thousands of homebound seniors, our nutritious meals are a lifeline for seniors living with limited resources.



By the NUMBERS

- Seniors Fed: **7,663**
- Meals Served: **1,188,113**
 - Home-Delivered & To-Go: **728,600**
 - Congregate: **151,767**
 - Frozen: **306,746**
- Improved food security for **85%**
- Increased knowledge of nutrition and healthy eating habits for **82%**

FY24 HIGHLIGHTS

- Surpassed **19 million meals** served
- Opened new congregate dining site in **La Mesa Adult Enrichment Center** and provided to-go meals for **Ed Brown Senior Center** in Rancho Bernardo
- Expanded to **38** meal routes across San Diego County

Meet UNA

Before retiring, Una worked in the hotel business at the front desk, the front office, and reception. Later in life, she went back to college and earned a degree in nutrition. *"I was all excited about starting my new career. Then the Great Recession of 2008 hit."* Federal funding was frozen.

The nutrition job market dried up. Una could not wait for the economy to improve, so she decided to retire. When a friend mentioned Serving Seniors. Una decided to learn more. Now, she comes to the Gary and Mary West Senior Wellness Center almost every day.

"It's made such a difference," Una says.

Una loves the food at the Wellness Center. Based on her knowledge of nutrition science, she values the high quality of the meals. *"I'm extremely impressed by the fresh vegetables and fruit. I really like the chicken with the different sauces."* Una also points out the importance of community. *"The meals. The interconnections with other seniors. The activities. If Serving Seniors ever went away, there'd be a lot of seniors out on the streets,"* said Una.



HEALTH and SOCIAL SERVICES

Supporting Independent Living



Older adults in poverty suffer higher rates of disabilities and untreated chronic illnesses. Without finding assistance, they risk losing their independence.

Serving Seniors' team of health educators and social service case managers provide a range of supportive services at sites across San Diego County, including health education, vitals checks, benefits access, emergency assistance, and other forms of care that keep seniors healthy and independent.

By the NUMBERS

- Health and Social Service Visits: **17,596**
- Seniors Served: **1,533**
- Outcomes Achieved:
 - Gained access to community resources: **82%**
 - Excellent or good health reported by **87%**
 - Ability to successfully manage their health: **91%**

FY24 HIGHLIGHTS

- Established health partnerships with Family Health Center of San Diego and **Shiley Eye Mobile Clinic**
- Increased number of Social Service Case Managers by **30%**

Meet LUIS

"My life is different because now I get up with a purpose. I can go someplace and find people that are like me and eat and socialize and make the day go by without sitting at home doing nothing." Serving Seniors changed Luis's life after just a few months.

Luis began spending time at the Gary and Mary West Senior Wellness Center in November 2023 a few months after his 60th birthday. He enjoys spending his days connecting with other seniors, which has improved his mental health.

"It's good socializing with good people. I used to get really bad depression and stay in bed all day, but I come here, and it gets rid of the depression to be around other people," says Luis.

Luis's next goal is becoming a volunteer to help other people and stay busy and give purpose to his days.



ENRICHMENT and ACTIVITIES

Building Happier, Healthier Lives



At Serving Seniors, we believe that happy lives longer. U.S. Surgeon General Vivek Murthy calls social isolation one of the greatest health threats in our country. Low-income seniors often miss out on staying socially active and intellectually engaged due to economic constraints and diminished social relationships. Through more than 1,200 activities and enrichment opportunities, Serving Seniors provided low-income seniors chances to move, learn, play, and enjoy life to the fullest, all while making friends and lasting connections.

By the NUMBERS

- Activities provided: **1,250**
- Average number of seniors participating each month: **1,022**
- Improved social connection for **75%**

FY24 HIGHLIGHTS

- Expanded number of wellness classes, including Zumba, bone-building, and Cardio Drumming by **10%**
- Hosted two major cultural events for the Chinese community, the **Moon Festival** and **Chinese New Year**
- An intergenerational **Multi-Cultural Holiday Celebration** at Harris Family Senior Residence/Mid City brought together hundreds of families and seniors to embrace their diverse heritage and cultures through food, activities and community building.

Meet LINDA

"It's a blessing living independently in a safe community," says Linda, age 65. Linda lives at the Harris Family Senior Residence, Serving Seniors' newest affordable and intergenerational housing community opened in City Heights in 2022. *"I love staying here. I love my apartment."* Bright, warm colors from the lime green couch to the light pink curtains with plants and paintings make the space more than just housing, but a haven of happiness and comfort.

Linda values her independence and being part of a community, improving her physical and mental well-being.

Involvement in activities like the garden club and fitness classes brings Linda joy and support. Her participation in the bone-building classes has been great for her fibromyalgia and she enjoys walking around the outside courtyard for exercise.

"Serving Seniors saved my life,"
says Linda.



DONOR Honor Roll

Serving Seniors Succeeds Thanks to Your Support

Thank you to the generous individuals, foundations, and corporations who made Serving Seniors' many programs and services possible during the FY23-24 fiscal year. We gratefully acknowledge our donors of \$1,000 or more.

\$100,000+

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Jing Zhao
... and many others!

FINANCIALS

Statement of Financial Position

Assets

Current Assets

Cash & cash equivalents	\$4,950,036
Investments	\$1,841,503
Grants receivable	\$1,724,597
Accounts receivable—related parties, net	\$352,384
Other receivable	\$85,102
Pledges receivable	\$293,869
Rent receivable	\$21,630
Accrued interest receivable	\$7,149
Prepaid expenses and other	\$395,777
Total Current Assets	\$9,672,047

Noncurrent Assets

Restricted reserves	\$563,383
Notes receivable, net	\$2,919,068
Land, building & equipment, net	\$26,625,476
Operating lease right-of-use asset, net	\$35,606
Investments in limited partnerships	\$274,446
Investments restricted for endowment	\$750,000
Beneficial interest in endowment funds	\$8,992
Total Noncurrent Assets	\$31,176,971

TOTAL ASSETS **\$40,849,018**

Liabilities and Net Assets

Current Liabilities

Accounts payable	\$856,693
Payroll & related liabilities	\$159,928
Tenant security deposits	\$27,000
Accrued paid time off	\$301,805
Other liabilities	\$179,082
Deferred revenue	\$9,548
Current portion of operating lease liability	\$8,381
Current portion of mortgage payable	\$64,155
Total Current Liabilities	\$1,606,592

Noncurrent Liabilities

Notes payable	\$2,200,000
Operating lease liability, net of current portion	\$27,863
Mortgage payable, net of current portion	\$1,341,926
Accrued interest payable	\$8,723
Total Noncurrent Liabilities	\$3,578,512

TOTAL LIABILITIES **\$5,185,104**

Net Assets

Without donor restrictions	
Undesignated	\$31,404,776
Board designated	\$2,913,469
Total net assets without donor restrictions	\$34,318,245

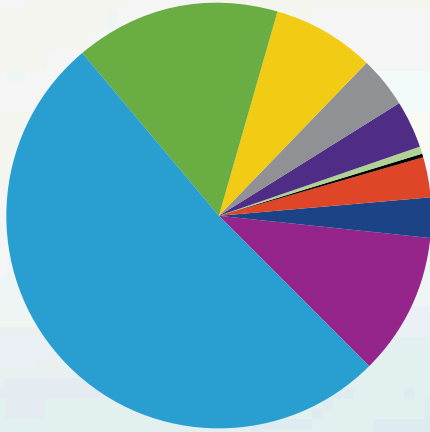
With donor restrictions	
Purpose restrictions	\$349,177
Time restrictions	\$237,500
Perpetual in nature	\$758,992
Total net assets with donor restrictions	\$1,345,669

Total Net Assets **\$35,663,914**

TOTAL LIABILITIES AND NET ASSETS **\$40,849,018**

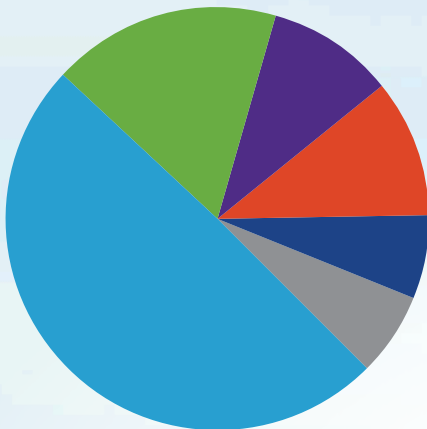
Statement of Activities

Revenue, Support and Gains



● Government Grants	\$8,975,554
● Contributions	\$2,716,286
● Rental Income	\$1,335,669
● Housing	\$697,383
● In-Kind Contributions	\$610,200
● Donations from Seniors Served	\$99,734
● Other Income	\$65,605
● Laundry & Vending Income	\$10,062
● Special Events	
<i>Special events revenue</i>	\$593,851
<i>Less cost of direct benefits to donors</i>	(\$63,875)
Special Events Revenue, Net	\$529,976
● Investment Income	\$528,177
● Net Assets Released from Restrictions	\$1,847,104
Total Revenue, Support and Gains	\$15,568,646

Expenses



Program Expenses	
● Nutrition Program	\$8,417,576
● Health & Social Services	\$2,953,270
● Housing Development & Facility Support	\$1,667,075
● Rental Real Estate	\$1,760,312
Total Program Expenses	\$14,798,233
Supporting Services	
● Management & General	\$1,097,403
● Fundraising	\$1,061,515
Total Supporting Services	\$2,158,918
Total Expenses	\$16,957,151

Change in Net Assets	-\$1,388,505
Net Assets at Beginning of Year	\$37,052,419

NET ASSETS AT END OF YEAR **\$35,663,914**

VOLUNTEER Service

It Starts with You

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 FY24, our volunteers became more engaged than ever: teaching classes, hosting social activities for our seniors, serving on committees, and so much more. These generous individuals and groups' extraordinary dedication and service make a world of difference to our clients.



By the NUMBERS

- Increase in Corporate & Civic Volunteer Group Participation: **134** compared to **53** in FY23
- Total Volunteer Hour Contributed: **18,561**
- Budget Savings Due to Volunteer Time: **\$716,640**

Source: Independent Sector: 2023 Value of Volunteer hours in California is \$38.61.



Corporate Partner SPOTLIGHT

SDG&E's generous donation of \$400,000 from their Community Assistance Fund was a tremendous boost in our capacity to meet the expanded needs of seniors in crisis.

It helped provide nutrition, emergency rental assistance, and case management support. For more than 30 years, SDG&E has stood by our side to help older adults live healthy lives.

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"REMEMBER, YOU ARE A GIFT,
AND YOU'LL FIND HAPPINESS IN IT."

"...AND EVERYBODY NEEDS YOU.
YOURSELF."
-Joaquin Anguera

