



ANNUAL REPORT 2015

SERVING
SENIORS
Celebrating 45 Years

We believe every senior
deserves to live a healthy and
fulfilling life.



We believe...successful aging
begins with a heart.



A letter from our President/CEO, Paul Downey

Dear Supporters and Friends:

Today about 10,000 people turned 65. That will happen every day for the next 19 years as baby boomers become seniors. At Serving Seniors, we ask: How can we promote successful aging for low-income seniors?

It begins with a heart. Factors that enhance successful aging include financial security, physical wellness, interactions with family and friends, and a sense of purpose. This is a formula we can aspire to achieve, but it is a challenge when living on a fixed income, when family and friends are miles away, or when physical issues prevent getting basic services.

For many seniors, aging becomes more of an exercise in survival than in living comfortably during their golden years. Many seniors live on about \$850 per month, forcing them to choose whether to pay rent or buy food.

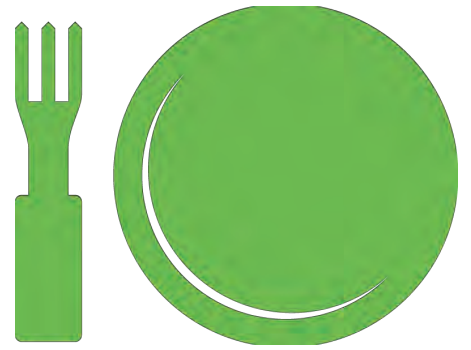
At the projected rate of aging adults, we will soon have an epidemic-sized crisis of seniors who cannot meet their basic needs.

Successful aging begins with successful service. We believe quality care can be coordinated in one place to offer housing recommendations, mental health services, legal advice, financial literacy skills, volunteer opportunities, wellness services, dental services and more. Serving Seniors is implementing a best practices model for care-coordinated service delivery to seniors. We couldn't do it without our many partners in health, education, government and philanthropy. We are a community with a heart.

I invite you to view our accomplishments in 2015. We hope you will join us in 2016 to help lead the way in wellness for low-income seniors.

With appreciation,

Paul Downey, President/CEO



We believe...no senior should be hungry.

*Do I pay rent or buy food?
Can I live without medicine
or food?*

No senior should have to ask themselves these questions. Yet it happens in San Diego every day.

A hot meal is the number one reason that people seek our assistance.

That is why Serving Seniors makes meals a priority.



Serving Seniors celebrated its 10 millionth meal on November 9, 2015.

In 2015...

- Serving Seniors delivered its 10 millionth meal. Mayor Kevin Faulconer, County Supervisor Rob Roberts, Board Chair Molly Cartmill and philanthropists Gary and Mary West helped us celebrate.
- Serving Seniors provided 2,300 meals daily, including 500 to seniors who are homebound. Meals are delivered to 10 congregate sites and private homes.
- A total of 554,525 meals were made for Serving Seniors clients in our kitchen.

"Every day Joyce comes and delivers these wonderful meals and what I really like is the little things: milk, bread, little cups of fruit, an orange, an apple," says Anne.



We believe...housing should be affordable.

More than 1,000 seniors are off the streets as a result of our Homeless Prevention Program.



With the average cost for a home in San Diego at \$215,000, affordable housing is out of reach for many seniors who live on a fixed income. We solve that gap by providing housing at a subsidized rate. Our two housing complexes are Potiker Family Senior Residence in downtown's East Village with 200 units and Potiker City Heights Square in mid-city with 150 units.

In 2015...

- Serving Seniors helped 484 seniors stay in affordable housing and kept them from seeking shelter on the streets, bringing our total number served to 1,000.
- Our case managers and social workers help seniors with entitlements, rental referrals and other housing issues.

"When I found out about the Homeless Prevention Program, I was up there that coming Thursday to enroll. After three months on the waiting list, I entered the Sara Frances Hotel. And, just like that, I was in my own place." – senior client



We believe...getting services should not be confusing.

Without family, many seniors become confused about how to access services.

Our dedicated team of case managers address a wide array of issues that seniors in poverty face on a daily basis.



We help seniors obtain social security benefits, arrange transportation, schedule doctor appointments, read difficult mail and contact local agencies to resolve problems that may prevent

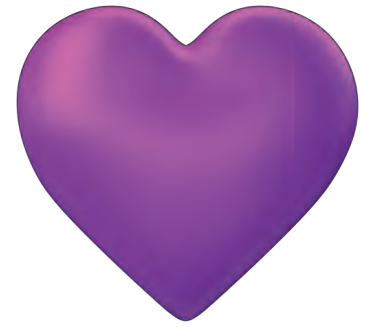
seniors from living independent and productive lives. We also provide services in Spanish, Tagalog and Mandarin to meet the diversity of our population.

Our compassionate staff provides the warm embrace of family that can save a senior's life.

In 2015...

- Serving Seniors provided 1,185 seniors with social service assistance.
- This resulted in a total of 8,516 social service visits.

“When I arrived, like so many other senior citizens, I was under the impression that only a meal was offered. However, I soon found out that the meals take a back seat to the services provided. At that time, I was staying in an environment that was unhealthy, physically and mentally.” -- senior client



We believe...a registered nurse and mental health services help save lives and reduce ER visits.

From blood pressure checks to heart health tips, our nurse identifies health issues before they become emergencies.



Serving Seniors employs a full time nurse who balances her time between the West Wellness Center with our two Potiker housing complexes. She identifies a number of issues before they become a crisis. Hypertension, high blood pressure and diabetes top the list.

For mental health services, Serving Seniors collaborates with Sharp Healthcare to bring a psychiatric nurse on site twice a week and a psychiatrist on site once a week. This has dramatically improved identification and treatment of mental health concerns.

In 2015...

- Serving Seniors supported 424 seniors with nurse or mental health care.
- This resulted in a total of 2,696 psych nurse / mental health visits.

“I spend most of my time educating seniors about their complex chronic illnesses and taking medications correctly,” says Christine Holcomb, RN.

We believe...we should never stop learning.



Lifelong learning is integral to wellness. Enriching the mind, body and soul allows seniors to enjoy a new skill, socialize with others and feel more mentally and physically fit.

Serving Seniors supports lifelong learning by engaging seniors in activities that support fitness, knowledge and social connections. Our activities and events include:

- A computer lab
- Line dancing
- Walking Club
- Photography workshops
- History classes
- Cultural events, including Chinese New Year
- Our popular “Feeling Fit” Fitness Classes — and much more!



In 2015...

- Serving Seniors offered more than 30 classes and activities.
- A total of 1,121 seniors participated in lifelong learning activities.
- Special days included: Senior Idol, Senior Prom, Chinese New Years and two special dinners thanks to our restaurant partner, *Monello & Bencotto*.



We believe...we are all in this together.

We connect with local, state and national groups to advocate for seniors, including:

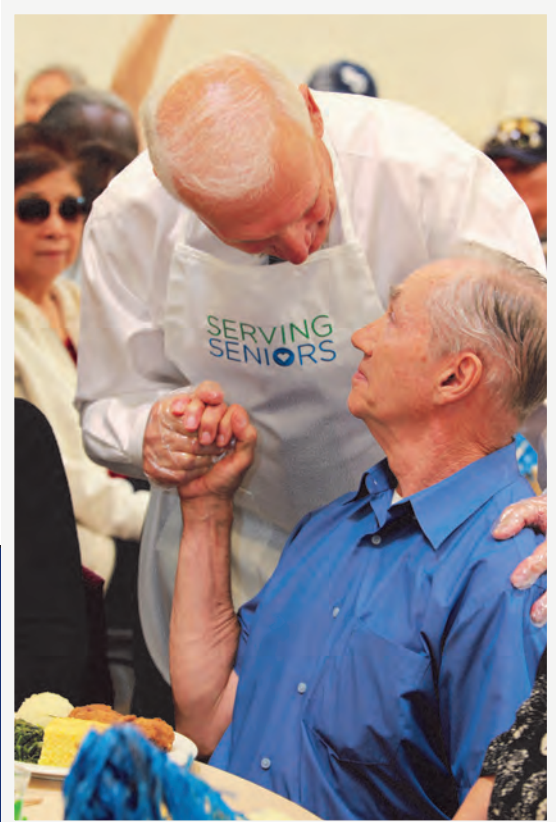
- *National Association of Nutrition & Aging Service Programs*
- *California Commission on Aging*
- *Older Adult Behavioral Health Services, Systems of Care, Health & Human Service Agency*
- *San Diego County Social Services Advisory Board*

We regard advocacy as a crucial activity. We advocate for public policy, for people needing assistance and to support governmental accountability and transparency.

We are all in this together and we encourage everyone to become an advocate. The efforts we make now will serve seniors today and tomorrow.

In 2015...

- CEO/President Paul Downey is on the boards of the National Association of Nutrition and Aging Services Program and was appointed to a second term on the California Commission on Aging. He was an attendee at the July 2015 White House Conference on Aging.
- Serving Seniors hired a Public Affairs Manager.
- Seniors met weekly as part of a Civic Engagement Committee.

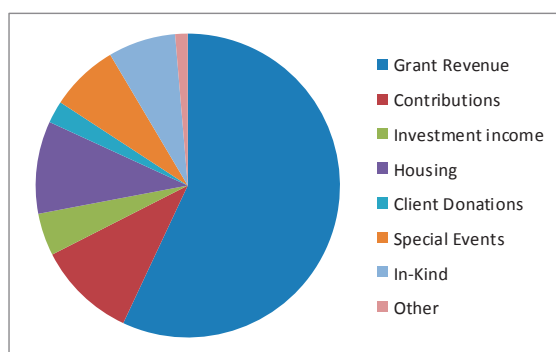


County Supervisor Ron Roberts shakes hands with John Currie during our 10 millionth meal event.

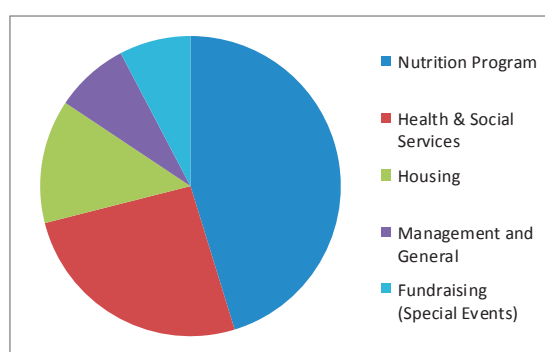


We believe...in balanced finances.

INCOME



EXPENSES



Grant Revenue	\$ 4,028,170
Contributions	\$ 744,177
Investment income	\$ 319,883
Housing	\$ 696,049
Client Donations	\$ 166,539
Special Events	\$ 514,537
In-Kind	\$ 507,520
Other	\$ 94,051
Total Revenue	\$ 7,070,916

Nutrition Program	\$ 2,922,650
Health & Social Services	\$ 1,665,669
Housing	\$ 860,491
Management and General	\$ 513,837
Fundraising (Special Events)	\$ 496,535
Total Expenses	\$ 6,459,182

Programs and services get 84.2% of our income.

NET ASSETS \$19,164,064

2015 by the numbers



554,525

meals served

4,448



unduplicated seniors

2,696



healthcare visits

have a safe home



484

social service visits



8,516

1,121

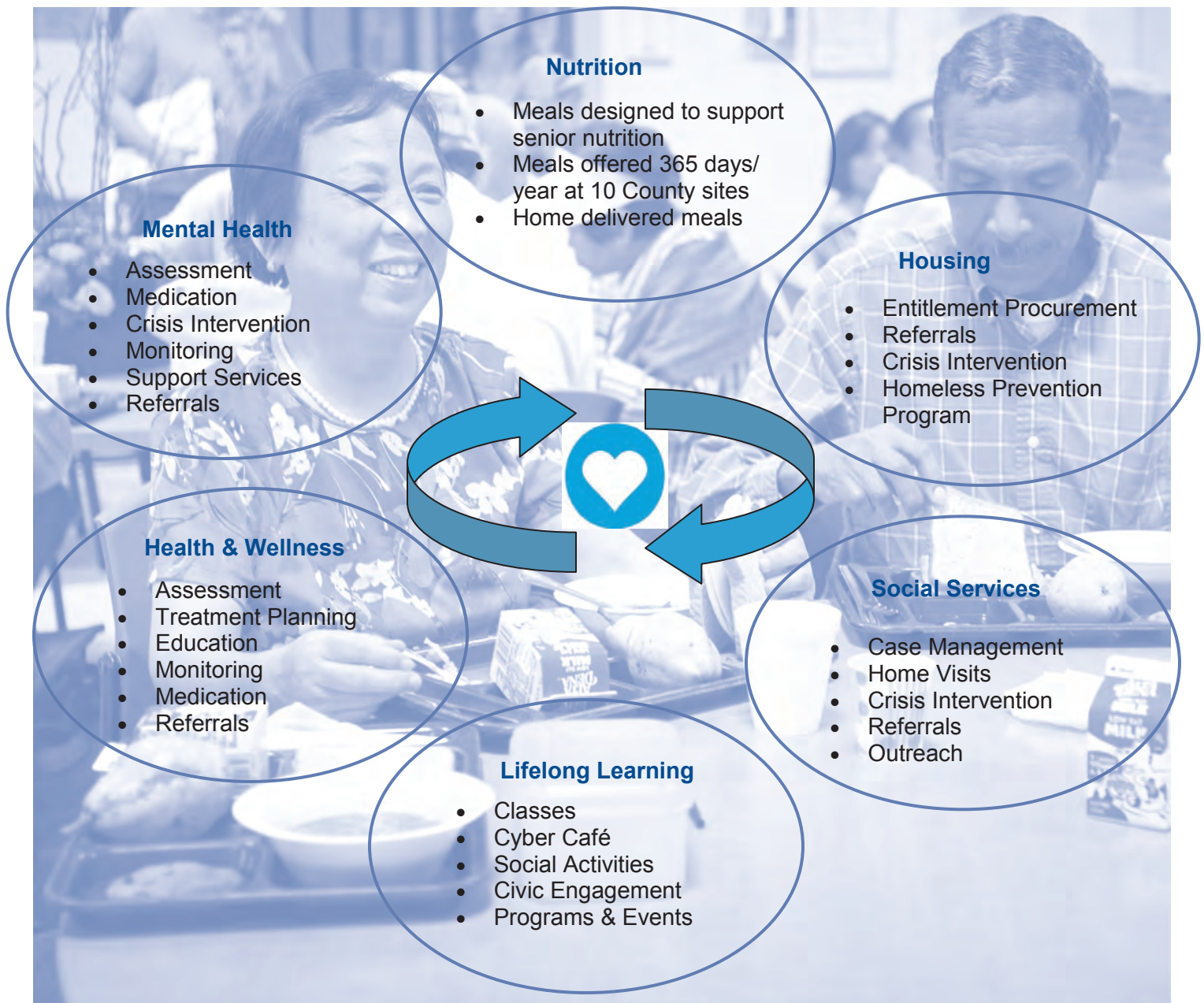
visits to classes & activities



Our Innovative Service Model

Our goal is to empower low-income senior adults to get the services they need by addressing the whole person. Our social workers and case managers identify health and safety issues that precede significant types of care. Nutrition is often an entry point for a number of aging concerns, such as: legal problems, entitlements, housing, mental health, access to a primary care doctor, socialization and purpose in life.

With a warm hand-off between providers, our services — from lunch to chronic care management — all take place under one roof so that **no senior has to navigate the path alone.**



Transforming the aging experience!

