



SEQUOIA

LIVINGSM

2018 ANNUAL REPORT



Experience is the reward of aging. And for us at Sequoia Living, it's what we celebrate every day. We connect with the life experiences our residents and clients bring to us, leveraging our own six decades of service to older adults, to create new experiences that are joyful and life-affirming.



OUR MISSION

Provide homes and services for healthy aging.

OUR VALUES

Excellence: Everything we do is of the highest quality

Integrity: Being honest, responsible, and ethical

Respect: Honoring each person as unique and special

Service: Meeting needs and exceeding customer expectations

Stewardship: Using our resources wisely and well

Teamwork: Accomplishing our goals together

OUR CORE BEHAVIORS

Compassionate

Attentive

Resourceful

Engaged

BOARD OF DIRECTORS, 2018

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Gordon Howie

Message from the President and Board Chair

Dear Residents, Donors, Supporters, and Friends,

We live in a time of rapid change. From telemedicine to artificial intelligence, technology is growing at previously unimaginable rates. At times, the pace can seem dizzying as our world becomes ever more complex.

Now more than ever, the sequoia tree—our symbol for more than sixty years—is especially meaningful. With its awe-inspiring size and vitality, it represents strength, longevity, and graceful aging. It reminds us of our responsibility to stand strong and remain true to our values in a fast-paced world. And it serves as the inspiration for our new name, Sequoia Living.

In these pages, you'll find stories of a year filled with growth and renewal as we embraced our new identity as Sequoia Living. With an eye toward the future, we broke new ground at Viamonte at Walnut Creek, expanded our resident services program to a new site in Marin County, and began major upgrades at two of our communities. We used new technology to connect affordable housing residents with more services and offer life-enhancing smart home options to residents in our CCRCs. And through programs like Blooms in Your Room and the

Best Friends™ Approach, we are creating communities where each person's unique gifts are honored.

Since our earliest days, Sequoia Living has been a leader in providing innovative services to our residents and the greater community. Although much has changed since our founding six decades ago, our commitment to our mission grows stronger with each passing year. It is an honor to build upon our legacy and to celebrate this milestone in our organization's history. Thank you for your support and your continued belief in our mission.

Sincerely,

David Berg
Sequoia Living President & CEO

C. Gordon Howie
Chair, Sequoia Living Board of Directors



**Although much has
changed since our
founding six decades ago,
our commitment to our
mission grows stronger
with each passing year.**

OUR NOVEMBER 2018
CCRC RESIDENT SURVEY

93%

of residents would recommend
their community to a friend

91%

of residents are satisfied or
very satisfied with their overall
experience at their community

7%

increase in food service
satisfaction since May 2018

Celebrating Excellence



The Sequoias Portola Valley, The Sequoias San Francisco, and The Tamalpais were awarded five-year terms of accreditation for aging services from the Commission on Accreditation of Rehabilitation Facilities (CARF) International. CARF accreditation is the highest level of accreditation that a senior living organization can receive. It demonstrates that Sequoia Living has made a commitment to continually improving our services, encouraging feedback through rigorous peer review, and putting the needs of residents at the center of everything we do.

Town Park Towers, our affordable housing community in San Jose, earned an exceptional score of 98/100 on the Housing and Urban Development's Real Estate Assessment Center (REAC) report.





Looking to the Future

BREAKING NEW GROUND

The future of senior living came to life this year at Viamonte at Walnut Creek, our bold new community slated to open in 2020. After exceeding reservation deposit goals, Sequoia Living closed on favorable bond financing in April. In May, future residents, staff, and special guests gathered for a festive Viamonte groundbreaking ceremony in Walnut Creek.

By June, the Viamonte construction site was abuzz with the tower crane installation, basement excavation, and concrete pour. Future neighbors met again in December for the annual Viamonte holiday dinner. The year closed with Viamonte on budget and on schedule for its grand opening in 2020.

ENHANCING ENVIRONMENTS

2018 kicked off preparations for upgrades to Eastern Park Apartments designed to make the community even more accessible, modern, and energy-efficient. Renovations to the building will include a new computer room, meeting room, sunroom, new HVAC, and solar panels. Each of the community's 201 units will receive an updated kitchen, including new paint and appliances, lights, and flooring; and 25 apartments will be fully wheelchair-accessible. Renovations are expected to begin in June 2019 and will be completed in 2021.

Transformation also began at The Sequoias Portola Valley in 2018 as part of an extensive campus-wide renovation project. The year's updates included a bright new fitness center, beautiful outdoor landscaping, an ADA-compliant entrance, modern administrative offices, and a guest room accessible for people with disabilities. Construction also began on an Asian-inspired arrival canopy and an elegant dining room. Upcoming renovations will include a new resident art gallery, library, great room, and café.



Viamonte groundbreaking




Viamonte site



Planned Eastern Park Apartments renovations

Groundbreaking photo: Anthony Thornton
Viamonte site photo: Cahill Contractors
Rendering courtesy SGPA Architecture and Planning



“I have chosen the work I do because housing is at the heart of people being able to live their lives fully. At Sequoia Living, we aren’t just creating another building; we’re creating a dynamic senior living community where we can change residents’ lives and help them fulfill their dreams.”

— Dave Latina, Vice President, Business Development



Embracing Innovation

BRIDGING THE LANGUAGE GAP WITH AN APP

Many residents of Western Park Apartments speak Mandarin, Cantonese, Russian, or Korean as their primary language. In the past, Resident Services staff had to either be bilingual or rely on outside interpreters to help monolingual residents access community resources.

Today, if a resident needs translation assistance, Resident Services staff simply pull out their iPad and open the Stratus translation app. Within seconds, a live interpreter appears on the screen, ready to provide real-time video translation. When one Korean-speaking resident had difficulty finding transportation, Resident Services Coordinator John Nagel used the Stratus app to help her access paratransit.

“Through the translator, we learned that the resident was eligible for even more services,” John says. “We also got a much fuller picture of her life.” News about the app is spreading among monolingual residents, who are telling their friends how using the tool with Resident Services staff has helped them access resources.

AGING IN PLACE WITH TECHNOLOGY

This year, The Tamalpais became the first senior living community in Marin County to offer Smart Home technology. Using an iPad or voice activation, Smart Home residents can control lights, television, music, blinds, and temperature. They can also use a video monitor or voice-enabled device to call other residents, the maintenance department, and the reception desk. The community even has a new mascot, “Toby at The Tam,” a robotic puppy who responds to voice and touch. Smart Home options are planned for more apartments as they become available for renovation.





Anthony Thornton



Building Relationships

WHERE COMMUNITY AND CREATIVITY BLOSSOM

In the heart of the Tenderloin, a caring, creative community is in bloom. Every two weeks, older adults gather at the San Francisco Senior Center's Downtown Center for "Blooms in Your Room," a flower arranging workshop led by community outreach coordinator Ilene "Sweetie" Shapiro.

Over smiles and conversation, seniors create colorful bouquets from flowers donated by Trader Joe's. By the end of each session, each participant has a beautiful handmade arrangement to take home in a vase provided by the Center. Participants are invited to bring their vases back to the Center to refill them with fresh blooms.

The opportunity to create, socialize, and bring home a bit of natural beauty is meaningful for low-income seniors who live in nearby single room occupancy hotels, Ilene says. The program is also an introduction to the Center's many other services and activities. "Participants are so happy to brighten up their room, make new friends, and learn about flowers," she explains. "It's heartwarming to see them leave with beautiful bouquets and huge smiles."

THE POWER OF FRIENDSHIP IN MEMORY CARE

Each day, Sequoia Living memory care staff members use the Best Friends™ approach to build trusting relationships with residents who have dementia. The approach uses the essential elements of friendship—respect, empathy, support, trust, and humor—to help memory care residents feel safe, secure, and valued.

"Getting to know our memory care residents on a deep, personal level is extremely gratifying," explains April Thompson, Director of Assisted Living and Memory Care at The Sequoias Portola Valley. "To understand who they are is to unlock pieces of their lives."

"People living with dementia have hopes, fears, and dreams just like all of us," says Carol Blackwell, Director of Assisted Living and Memory Care at The Sequoias San Francisco. "It's so important to recognize that deep inside, there is still a person there."

In November, David Troxel, author of *The Best Friends Approach to Dementia Care*, was the featured speaker for a series of dementia workshops at our life care communities. These workshops will continue throughout 2019, as part of our commitment to serving residents with memory loss and their families.

Senior Services for Northern California



As the supporting organization of Sequoia Living, Senior Services for Northern California (SSNC) is dedicated to improving the lives of seniors, whether they live in a continuing care retirement community, affordable housing, or in their own homes. We raise funds for programs and services that help Bay Area seniors stay healthy, live independently, and engage in activities that enhance their quality of life.



SSNC BOARD OF TRUSTEES, 2018

Steve Herman, Chair	David Levin, Secretary
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Arlene Kirsch	



Ron Streitz



Steve Herman

Message from SSNC Chief Fund Development Officer & Chair of Trustees

What was the outlook for philanthropy in 2018? Positive beyond a doubt.

The power to change the world through gifts of time, talent and treasure is no doubt as old as humankind. Aristotle mused: “To give away money is an easy matter and in any man’s power. But to decide to whom to give it, and how large, and when, and for what purpose and how, is neither in every man’s power nor an easy matter.”

Philanthropic decisions are not an “easy matter” today as well, and require careful consideration. Clearly, our donors have taken this advice to heart. SSNC’s 2018 revenues from all sources exceeded \$7 million, with more than \$5 million coming from individual donors. Over \$3 million of those individual donations came in the form of legacy gifts such as charitable trusts and gift annuities.

Ultimately, we cannot judge our success by the amount of money raised alone, but how it is spent. As reflected in this annual report, donor dollars sustain and grow the programs that matter to our residents and the greater community: The Tomorrow Fund, Sequoia Living Community Services, San Francisco Senior Center, AARP Foundation Experience Corps Marin, and many more. These programs will be supported now and for many years to come.

Our donors’ outstanding generosity far exceeded our expectations for the year. There is a level of trust implicit in every gift that places a burden of intelligent, ethical management of these donations upon our Trustees to ensure that the intentions for each dollar are honored.

We cannot express our gratitude enough. Each donor has given us an important charge: to act as their instrument for making a difference in the world. Thank you for giving us the opportunity to do so.

Sincerely,

Ron Streitz
Chief Fund Development Officer
Senior Services for Northern California

Steve Herman
Chair of the Board of Trustees
Senior Services for Northern California

2018 IMPACT SNAPSHOT

2,210

elementary students tutored by
Experience Corps Marin volunteers

50,000

low-cost meals provided at our
San Francisco Senior Centers

2,255

affordable housing residents served
by Resident Services Coordinators

2,180

diverse seniors participated in
activities and programs at our
San Francisco Senior Centers



Each year, Sequoia Living Community Services Programs help thousands of Bay Area seniors maintain their health, live independently, and stay engaged in society. Our programs are made possible by generous contributions from our residents, staff, board members, corporate partners, and foundations in the communities we serve.

Sequoia Living Community Services Programs

SAN FRANCISCO SENIOR CENTER

Founded in 1947, San Francisco Senior Center is the nation's oldest nonprofit senior center, providing classes, workshops, wellness programs, and critical assistance to more than 2,000 older adults and people with disabilities at its Tenderloin and Aquatic Park sites. The Center also collaborates with Project Open Hand to provide over 50,000 low-cost meals to seniors and adults with disabilities.

RESIDENT SERVICES PROGRAM

The Resident Services Program serves low-income seniors and people with disabilities who reside in nineteen affordable housing properties in the Bay Area. Through non-profit housing partnerships, Resident Service Coordinators provide on-site services, crisis management, housing sustainability support, and educational and health related activities.

INTERGENERATIONAL PROGRAM

Through a grant provided by San Francisco Department of Aging and Adult Services' Dignity Fund, the Intergenerational Program focuses on seniors and adults with disabilities who live in fourteen San Francisco affordable housing sites where Sequoia Living provides services. The program partners with local schools to organize activities and foster relationships with residents. An adult mentoring program provides additional support for residents who are in recovery from substance abuse.

HOME MATCH SAN FRANCISCO

In partnership with the City and County of San Francisco and Covia, Sequoia Living Community Services matches senior homeowners who need additional income with people who are seeking affordable housing.

AARP FOUNDATION EXPERIENCE CORPS® MARIN

AARP Foundation Experience Corps Marin is an intergenerational volunteer-based tutoring program that helps children who read below grade level become great readers by the end of third grade. The program inspires, trains, and empowers adults 50 and older to teach struggling students to read. Experience Corps Marin has been recognized by AARP as one of its largest California programs, serving over 2,210 students in 93 classrooms with 130 senior volunteers providing over 8,500 hours of instruction.

Five years ago, retired lawyer Paul Sloan was looking for a way to give back to his community. "It was important to me to feel useful and to do something good for others," Paul explains. When a friend suggested Paul volunteer with Experience Corps Marin, Paul found just what he was searching for.



Twice a week, Paul volunteers with third graders in Amy Probst's classroom at Coleman Elementary School. Many of Ms. Probst's students are English language learners who need extra help with reading. Reading with "Mr. Paul" helps the students build their language and literacy skills while receiving positive attention from a caring adult.

Paul enjoys volunteering in Ms. Probst's classroom so much that he has recruited two Experience Corps volunteers himself. "It's the perfect outlet to make use of your skills and make a difference," he says. For his dedication, Paul was recognized as Volunteer of the Week by the Marin Independent Journal.



We are grateful for the generous support of our residents, board members, staff, vendors, and foundations. Thank you for helping to improve the quality of life for older adults in our communities and throughout the Bay Area.

You can support our work and give a gift that will touch people's lives for generations to come.

Contact us at giving@sequoialiving.org or 415.202.7805 to learn more.

WE OFFER A RANGE OF DIRECT AND PLANNED GIVING OPTIONS, INCLUDING:

- Charitable Remainder Trusts
- Charitable Remainder Unitrusts
- IRA Rollovers
- Vehicle Donations
- Major Gifts (cash, bonds, securities)
- Bequests in Will
- Grants
- Gifts in Kind

Please contact giving@sequoialiving.org to learn more.

Celebrate for a Cause

Every year, the Sequoia Living Gala brings residents, staff and supporters together for the largest fundraiser for our Community Services programs. Our 2018 Gala raised \$194,519 for AARP Experience Corps® Marin, San Francisco Senior Center, HOME MATCH, and our Resident Services Programs.

The 17th annual Sequoia Living Gala will be held on October 15, 2019 at the St. Francis Yacht Club in San Francisco and will be hosted by residents of The Tamalpais.

For tickets or event sponsorship information, please email events@sequoialiving.org or call 415.202.7819.

Thank You, Gala Sponsors!

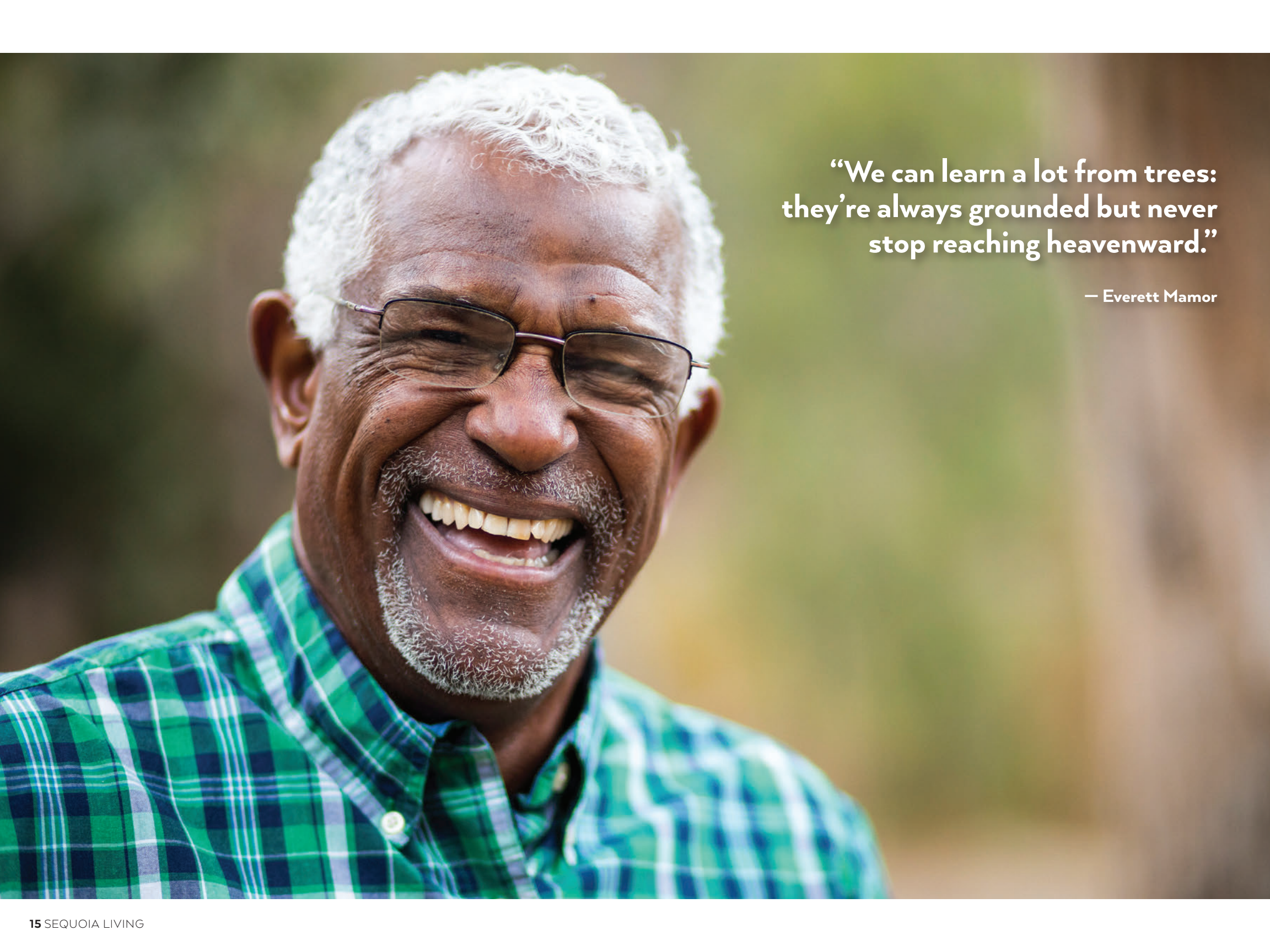
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David & Gerri Berg
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James Coran
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Planning
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& Door
US Bank
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National
J. Malcolm Visbal
Barbara Ward
Steve White
John & Leslie Woodward





**“We can learn a lot from trees:
they’re always grounded but never
stop reaching heavenward.”**

— Everett Mamor

Financials

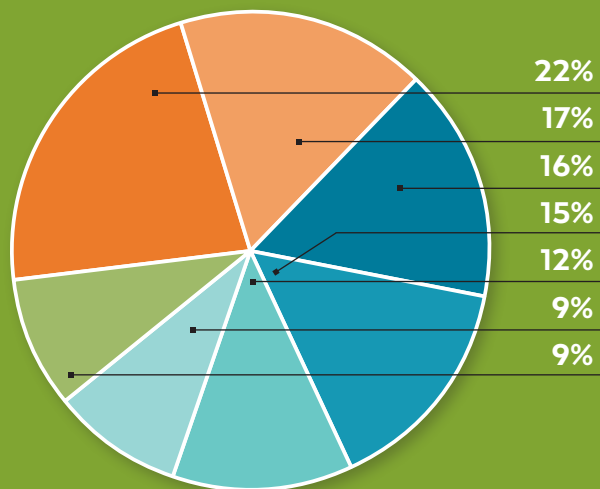
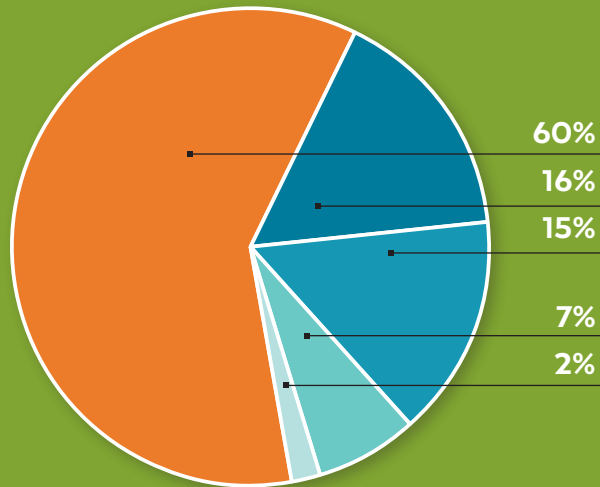
Summarized Audited Operating Results (in Thousands)

REVENUES

	2018	2017
Resident fees	\$66,137	\$64,820
Amortization of entrance fees	17,957	16,378
Fees for service and other income	17,452	14,487
Investment income including realized gains and losses on investments	7,130	4,097
SSNC activity and support	2,014	1,776
	110,690	101,558

EXPENSES

	2018	2017
Health care	24,624	23,054
Housing	19,164	21,109
Other program services	17,472	16,777
Food service	15,957	14,898
Depreciation	12,786	11,739
Program support expense	10,301	8,041
Interest	9,699	5,049
	110,003	100,667
Excess of operating revenues over expenses	\$687	\$891





**“I feel a great regard for trees;
they represent age and beauty and
the miracles of life and growth.”**

— Louise Dickinson Rich

Our Communities



The Woods

43300 Little River Airport Road
Little River, CA 95456
707.937.0294



The Tamalpais

501 Via Casitas
Greenbrae, CA 94904
415.461.2300



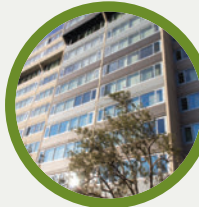
The Sequoias San Francisco

1400 Geary Boulevard
San Francisco, CA 94109
415.922.9700



Eastern Park Apartments

711 Eddy Street
San Francisco, CA 94109
415.776.0114



Western Park Apartments

1280 Laguna Street
San Francisco, CA 94115
415.922.5436



Viamonte Preview Center

165 Lennon Lane, Suite 105
Walnut Creek, CA 94598
925.621.6600



Town Park Towers

60 N 3rd Street
San Jose, CA 95112
408.288.8750



The Sequoias Portola Valley

501 Portola Road
Portola Valley, CA 94028
650.851.1501

Sequoia Living Home Office

1525 Post Street, San Francisco, CA 94109
415.202.7800

Community Services

1525 Post Street, San Francisco, CA 94109
415.351.3641

Learn more: www.sequoialiving.org



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