



# Enriching the Experience of Aging



# Welcome

**This annual report from Northern California Presbyterian Homes and Services contains a wealth of information: a review of noteworthy events of calendar year 2013, a summary of financial performance, photos of our Board members, and snapshots of the facilities that house our residents. But what sets 2013 apart is the completion of the first year of a five-year strategic plan.**

This effort, the results of which are detailed opposite, involved virtually everyone at NCPHS and, without a doubt, will affect everyone in the organization for years to come.

The strategic plan covers a great deal of ground. Based on a thorough analysis of the rapidly changing market for senior housing services, developed to take maximum advantage of both the strengths and weaknesses of the organization, and vetted by staff, management and residents, it sets five major goals and presents broad plans on how to achieve them.

One of the most valuable outcomes of the strategic planning process is the concept “Enriching the Experience of Aging,” which will be our ongoing touchstone. It encapsulates what matters most to us at NCPHS: a caring, dynamic community of seniors and people who care for them.

As we reflect on the accomplishments of 2013, we begin with the sequoia on our cover. The symbol of NCPHS, it is the world’s largest tree, but it comes from one tiny seed. Like our agency, it stands the test of time.

# The NCPHS Strategic Plan: Enriching the Experience of Aging

NCPHS' strategic plan covers the years 2013-2017, years that will bring many changes. The plan is designed to help us meet the challenges of a changing field and maximize our services.

## STRATEGIC PLAN GOALS

1  
Strengthen our business models

2  
Strengthen our financial performance

3  
Excel in service, quality and innovation

4  
Benefit the local community

5  
Develop and promote exceptional staff performance

## OUR CORE PURPOSE

### Why Do We Exist?

- > Enriching the Experience of Aging

## OUR CORE BEHAVIORS

### How Do We Behave?

- > Compassionate
- > Attentive
- > Resourceful
- > Engaged

## OUR STRATEGIC ANCHORS

### How to Succeed?

- > Quality driven
- > Customer focused
- > Inclusion motivated
- > Fiscally responsible

# It Was a Very Good Year



Barbara E. Hood, Oliver Wesson



The Sequoias—San Francisco

2013 marked the completion of the first year in our five-year strategic plan for 2013-2017. The priorities we established for this first year have been completed. Our accomplishments include:

- Successful attainment of accreditation of our three Continuing Care Retirement Communities. This was a full year of self-evaluation in how we care for our residents and manage the communities.
- Refinancing for our affordable housing community, Western Park Apartments. We were able to obtain about \$20 million from tax credits and limited partners to completely upgrade the community.
- Creation of a new floor of assisted living apartments and the remodel of the assisted living floor into a memory care center at The Sequoias—San Francisco. This provided for state-of-the-art units in assisted living and a dedicated space for residents needing dementia care.
- Completion of a \$2 million campaign to raise funds for the new assisted living and memory care center. We thank our generous residents for their support of this project.
- The launch of our new core purpose: Enriching the Experience of Aging. The Board and staff have embraced this theme and the behaviors that we identified to accomplish our purpose: Compassionate, Attentive, Resourceful and Engaged.
- Expanding programs for the elderly, committing capital expenditures to modernize our existing facilities, and identifying new properties to increase the number of communities.

Because of the incredible commitment and dedication of NCPHS staff, we continue to serve our residents and improve the communities where they live. We look forward to being able to reach out to more older adults with new programs and innovative communities in the years to come. Our goal is to always be the best employer, have the best communities, and provide the best services for those within the NCPHS family.

Barbara E. Hood  
President & CEO

Oliver Wesson  
Chair, Board of Directors, NCPHS

# The Foundation's Work Continues



Judith Loura, Dorothy Pett



The Sequoias—Portola Valley

Thank you to residents, Board members, staff, community donors, corporations and foundations for their kind and generous support of our programs and services. A total of \$3,916,793 was donated in 2013. Our 11th Annual Gala raised \$158,000 to support Community Services. We are so fortunate to have such a charitable group of constituents.

The Sequoias—San Francisco began a capital improvement project to renovate the third floor tower of the building into a new Assisted Living wing and convert the current Assisted Living floor into a Memory Care Center in 2012. Residents, Board members, staff and foundations contributed \$2 million towards this effort. What a success!

During 2013, SSNC disbursed a record amount of funding to NCPHS communities. A total of \$656,777 was given back to our Continuing Care Retirement Communities, affordable housing communities and community service programs for support of services that improve the quality of life for people. Some examples of projects supported by SSNC include:

- Emergency relief grants for employees and affordable housing community residents who have encountered a financial setback;
- Health and exercise equipment for our housing communities;
- Artwork and landscaping to improve the aesthetics of our housing communities;
- Newspaper subscriptions and library supplies for our housing communities; and
- Tomorrow Fund assistance for residents in our life care communities who run short of funds.

SSNC was created to raise funds for NCPHS to improve the quality of life for seniors and those who serve them. Most of the funds raised stay in our residential communities but the proceeds from the Gala and foundation grants support the Community Services offered by NCPHS that reach low- to middle-income seniors in need of social, recreational and health services. On their behalf, thank you for your support.

A handwritten signature in black ink that reads "Judith D. Loura".

Judith Loura  
Executive Director

A handwritten signature in black ink that reads "Dorothy Pett".

Dorothy Pett  
Chair, SSNC Trustees

# Securing the Future



Dave Latina, Roberta Mundie



Kokoro Assisted Living

The year 2013 was very exciting and ambitious for Northern California Presbyterian Senior Ventures (NCP-SV). In accordance with NCPHS' strategic plan, NCP-SV formed a new Project Financing Task Force to guide implementation of NCPHS' business development and growth strategy. The Task Force developed the following goals: identify capital sources within NCPHS to implement growth strategy; find alternative financing structures for new projects, acquisitions or development; and seek opportunities to manage development risk and protect NCPHS.

As the senior market continues to grow, the continuing care retirement community (CCRC) model itself has grown and is adapting to meet the changing demands and preferences of seniors by offering choices in housing and care models. Compared with other generations, baby boomers are looking for greater variety in residential and community options. Their preferences are evolving away from health care models and toward hospitality and choice. NCPHS monitors those trends carefully to maintain the desirability of our current CCRCs and to expand our services beyond CCRCs' walls.

NCP-SV is proud to report that we have accomplished our goal of identifying a new senior housing development site to be the potential future home of our fourth CCRC in the Bay Area. This new community will be a complementary, not a competitive, business model to NCPHS' three existing Life Care Communities. We maintain a strong commitment to excellence while constituting a groundbreaking force in enriching the experience of aging. Through this investment, we will increase NCPHS' potential for incremental revenue, expand our competitive market share, raise profitability, inspire innovation in all of our senior communities and deliver on our mission.

Consumer choice will continue to influence the shape of future CCRCs, and NCPHS is excited to be a driving force at the forefront of innovative senior communities. Our growth strategy will succeed when we remain focused on our strategic anchors to be quality driven, customer focused, inclusion motivated and fiscally responsible.

Dave Latina  
Vice President, NCP-SV

Roberta Mundie  
Chair, Board of Managers, NCP-SV



# Social Accountability and Community Services

NCPHS serves not only our family of residents, but also the communities of which we are a part. Programs funded by NCPHS help tens of thousands of Bay Area seniors.

## **SOCIAL SERVICES/CASE MANAGEMENT**

NCPHS provides an integrated, comprehensive coordination of care that stabilizes, supports, and monitors clients who need long- or short-term care until they can manage independently or appropriate services are located and arranged for them.

Case management includes client intake and assessment, service arrangement, care planning and monitoring, counseling and referrals, and focuses on assessing seniors' needs and seeking programs and providers to meet those needs.

Social services include supportive housing and the WellElder® program that allows seniors to age in place by helping to meet their health care needs. WellElder® serves 600 people annually through linkage with other home, community-based health services. NCPHS provides social workers to 25 low-income communities who, in turn, work individually with residents to connect them with transportation, meals, mental health services and other referrals.

## **SAN FRANCISCO SENIOR CENTERS**

The San Francisco Senior Center (SFSC) offers critical programs and services to older adults with a goal of helping seniors to age in place. Offerings include a hot nutritious lunch, computer classes, fitness classes, socialization, social services, and information and assistance.

Aquatic Park and Downtown promote wellness and engagement to 2,000 participants annually. Last year 30,560 meals were served to SFSC clients.

The Downtown Center provides a safe, enriching environment for seniors of the Tenderloin. Outreach to surrounding housing offers basic services to those most at-risk.

Aquatic Park Center offers a diverse series of activities which focus on the arts, fitness, and lifelong learning. The Living Well project encourages seniors to develop goals for improved health and wellness.



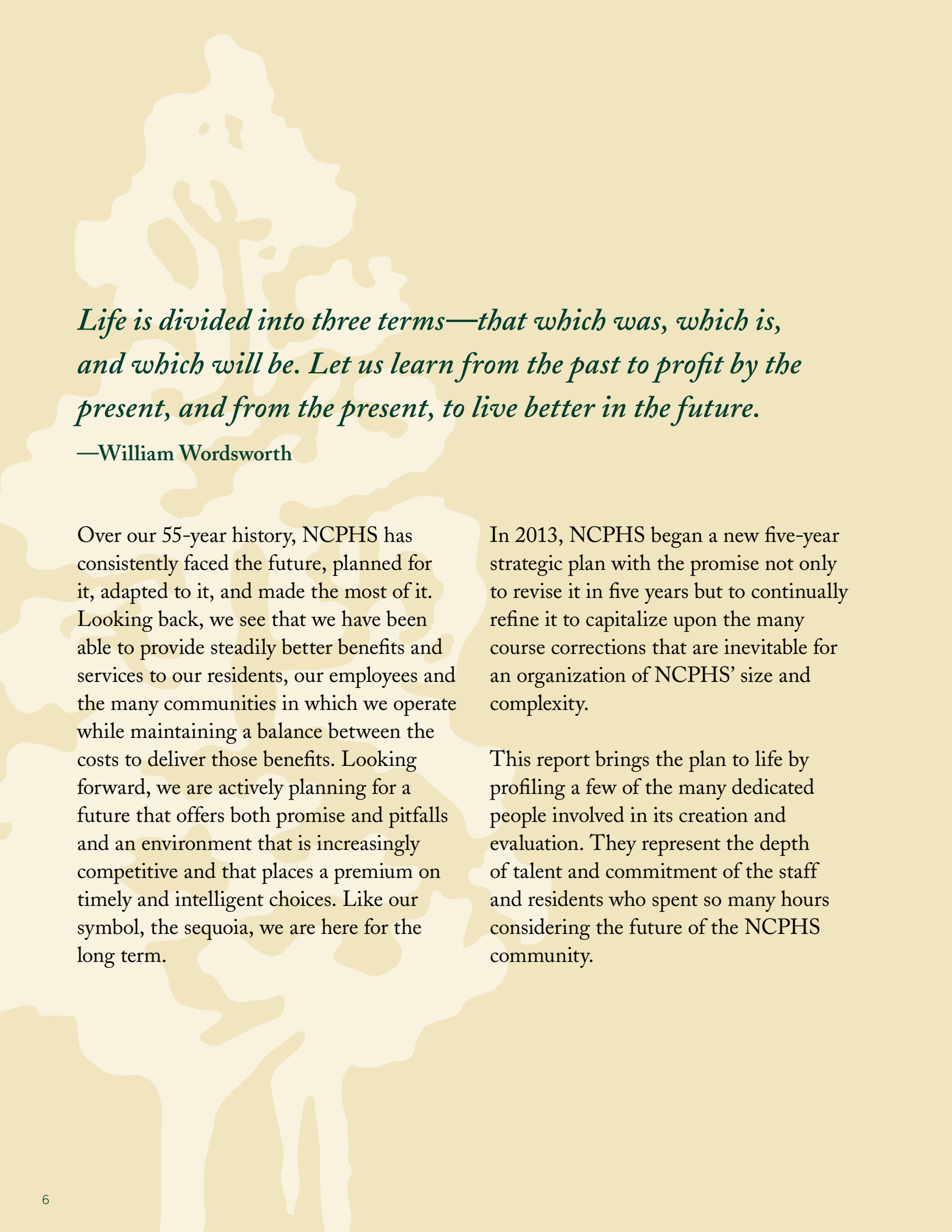
## **CIVIC/COMMUNITY ENGAGEMENT**

The mission of AARP Experience Corps Marin (ECM) is to promote literacy among at-risk students by drawing on the expertise of older adults. In 2013, ECM's volunteers provided 12,500 hours of service as tutors and mentors for children in kindergarten through third grade.

Coming of Age: Bay Area (COA) utilizes the talents of people age 50+ with programs that benefit the wider community. These programs help COA's 1,600 members make transitions to the next phase of their lives by helping individuals plan for their futures, pursue lifelong learning and engage in meaningful community service.

## **SAN FRANCISCO TRANSITIONAL CARE PROGRAM (SFTCP)**

SFTCP helps seniors discharged from hospitals who are at risk of readmission by offering services that help to ensure a safe return home. Partners include eight San Francisco hospitals and nine community-based organizations. This bridge to normal life saves lives and alleviates suffering while reducing Medicare costs.



*Life is divided into three terms—that which was, which is, and which will be. Let us learn from the past to profit by the present, and from the present, to live better in the future.*

—William Wordsworth

Over our 55-year history, NCPHS has consistently faced the future, planned for it, adapted to it, and made the most of it. Looking back, we see that we have been able to provide steadily better benefits and services to our residents, our employees and the many communities in which we operate while maintaining a balance between the costs to deliver those benefits. Looking forward, we are actively planning for a future that offers both promise and pitfalls and an environment that is increasingly competitive and that places a premium on timely and intelligent choices. Like our symbol, the sequoia, we are here for the long term.

In 2013, NCPHS began a new five-year strategic plan with the promise not only to revise it in five years but to continually refine it to capitalize upon the many course corrections that are inevitable for an organization of NCPHS' size and complexity.

This report brings the plan to life by profiling a few of the many dedicated people involved in its creation and evaluation. They represent the depth of talent and commitment of the staff and residents who spent so many hours considering the future of the NCPHS community.



# Pat Skillman

RESIDENT, THE SEQUOIAS—PORTOLA VALLEY

**Although a third-generation San Franciscan,** Pat spent more than 40 years in the Boston area where her husband had a career in academic medicine. In 2008 she returned to the Bay Area and moved into The Sequoias—Portola Valley. She had looked at other communities, but at the Sequoias, “I love the friendly warmth and informality of the people, the access to the outdoors, the wilderness area and hiking trails, the ability to walk out my door and immediately be in ‘nature’ (no endless corridors or elevators!)”

Pat believes her most meaningful work was as a volunteer in the areas of health, education and religion. She became very involved in the Star Island Corporation, a group that has maintained an educational and religious conference center off the New Hampshire coast for 98 years. There she helped instigate a five-year strategic plan co-founding a permanent trust (now grown to \$3.5 million) for needed funds and addressed environmental and conservation issues to ensure the center’s future.

Pat has monitored the progress of the NCPHS strategic plan carefully. “I like the hope embodied in the goals of the Strategic Plan,” she says. “I know that at this early stage, the words have yet to be fully realized by actions but the path ahead is promising.”

“Much depends, I believe, on each community’s Executive Director,” says Pat. “Despite the ‘familial’ connections between the CCRCs, each is quite different and the Strategic Plan needs to be adapted accordingly.” NCPHS has made its future plans while both looking forward and back. As a resident, Pat believes that our parent organization, NCPHS, is on the right track to ensure that our communities continue to thrive into the future.



# Jay Zimmer

EXECUTIVE DIRECTOR, THE SEQUOIAS—PORTOLA VALLEY

Jay Zimmer has been the Executive Director at The Sequoias—Portola Valley since June 2012. All three of the Executive Directors of CCRCs worked directly on the development of the strategic plan and on prioritizing the many options presented by senior management and the Board. As a senior manager and Board member in other organizations, Jay had been involved in many prior strategic planning initiatives.

Given his experience and success in leading organizations and his ability to turn around challenged business units, Jay was recruited by NCPHS to bring a strategic vision to The Sequoias—Portola Valley, build a solid management team, and create financial and organizational stability for the community after several years of management turnover.

In the short term, Jay feels that stabilizing the community and strengthening the NCPHS business model with more choice of services, amenities and contract types is critical. “Our financial success has improved at SPV over the past two years and will continue to do so,” he says. “Additionally, upgrading the main building, entryway, dining services, fitness facilities and pool will attract residents seeking a more modern and comprehensive wellness environment. We have a great deal of ‘catch-up’ to do and the strategic plan will help us stay focused.”

Jay believes that our core purpose of enriching the experience of aging is the perfect alignment tool. “It allows us to think creatively about what residents will come to expect from NCPHS as an innovator and leader in the industry,” he says. “One of the keys will be to develop strategic partnerships and alliances with other forward-thinking, creative organizations both within and outside of the industry.”



# Susan Dichter

COMMUNITY SERVICES DIRECTOR OF SOCIAL AND SUPPORTIVE SERVICES

**Susan brings to NCPHS a unique combination** of academic training (BA in Social Work and an MS in Counseling) plus two decades “on the ground” delivering social services on the streets of Philadelphia.

“I was looking for an employment opportunity in the Bay Area so that I could be closer to my son,” she says. “With 30 years of nonprofit management experience and a commitment to working with vulnerable populations, the Social Services Director position at NCPHS was a perfect match.”

Susan works in a leadership capacity, supporting staff, building programs, collaborating with government agencies, and advocating for low-income families and adults. With the implementation of the strategic plan, NCPHS will intensify its focus on Community Services and Susan’s position will become even more critical.

As the Community Services Director of Social and Supportive Services, Susan is responsible for the Transitional Care Program for hospital-discharged adults and also the Living at Home Program that provides service coordination and health education in affordable housing communities.

“I’ve worked with other nonprofit organizations to create and implement their strategic plans,” she says. “When a whole organization gets involved in creating a strategic plan, the results significantly impact Board and staff commitment to the mission. Outcomes include better fundraising, higher-quality client services, and stronger operations.”





# David Berg

SENIOR VICE PRESIDENT

During his career, David Berg has worked on strategic plans for over 30 organizations: hospital systems, academic medical centers, affordable housing developers, senior living companies, and community services organizations. “I have seen organizations turn to strategic planning when they were at the top of their game and ready to break into a new space and when they suffered in the strategic doldrums,” he says.

From his experience on the NCPHS management team over the last six years in both operations and business development roles and through consulting assignments for NCPHS going back to 2003, David knows the organization well. “I have a good read on the strategic position of NCPHS and it is excellent,” he says. “We are an organization with dedicated employees and vibrant communities. We have a foundation of strengths built up over 50 years that creates enormous potential. Tapping into that potential is what the strategic plan is all about.”

David is a lifelong learner who likes a fresh challenge. When he joined the NCPHS management team in 2008 it was at an important juncture in his life. “My kids were both out of the house and my wife and I moved from the suburbs back to the city,” he says. “At the same time I left a career that was predominately focused on hospitals and health systems.”

David picked NCPHS because it had a great leadership team and he thought his experience and perspective would add value. Working with a senior living organization seemed a perfect fit for his career change. “My view of aging is that it is essentially a learning process and a chance to adapt to new personal circumstances,” he says. “An organization dedicated to enriching the experience of aging was a perfect fit.”



# Angie Pratt

## DIRECTOR OF COMMUNITY ENGAGEMENT PROGRAMS

**“I have worked in senior services since 2004,”** says Angie Pratt, who was hired in July 2013 as Director of Community Engagement Programs. She was working as Director of the Alzheimer’s Association in Northern Nevada but having lived in the Bay Area before, she greatly missed the culture and environment. “I was looking for a way to return here.”

Angie has been involved in the planning and implementation of strategic plans for large agencies. “The process used—that is, asking key Board members and staff of various programs and staffing levels, and at times, even ‘customers’ to be involved in the process—is energizing,” she says.

Angie feels that all strategic plans have this in common: they are based on the Vision and Mission. “They also must need to be both person-centered and impact the community as a whole,” she says. “All parts of the strategic plan will affect our Community Engagement Programs both immediately and for the long term.”

Angie finds these developments exciting but what is even more exciting is when all staff reflect on their individual and collective enactment of the plan. “We do this by constantly measuring where we are strong and where we need to improve,” she says. “We don’t need to be perfect, we just need to make a difference and an impact on our communities—locally and beyond.”



# John Koselak

EXECUTIVE DIRECTOR, THE TAMALPAIS

**John's background is in the hospitality management field,** in hotels ranging from high-end boutiques to large convention-style hotels. "I've spent my last nine years in the senior living industry," he says. "I wanted to return to the Bay Area and The Tamalpais had the greatest appeal for me: its location, reputation and company core values meshed well with my beliefs and management style."

John is very involved with the development and implementation of The Tamalpais strategic plan. He believes that its biggest impact will come immediately in the form of the Hospitality Committee, a group of residents on each floor who welcome and acclimatize new residents. For the longer term, he says, "I believe that the organization has moved strongly on a directive to expand and grow the company as a whole."

John believes that the five goals that form the strategic plan's framework address all the necessary areas. "They encompass growth and staff development, reinforce our role in the local communities, and improve financial stability and customer satisfaction," he says. "The core purpose expresses NCPHS' reason for existing in one short sentence, making it clear to all employees at every level in the organization and providing consistency and continuity."

John is happy with the way everyone has participated in the process so far. "In 2013 the strategic plan was communicated to all levels of management and supervisors," he says. "In 2014 we will reach out and involve everyone in its implementation."



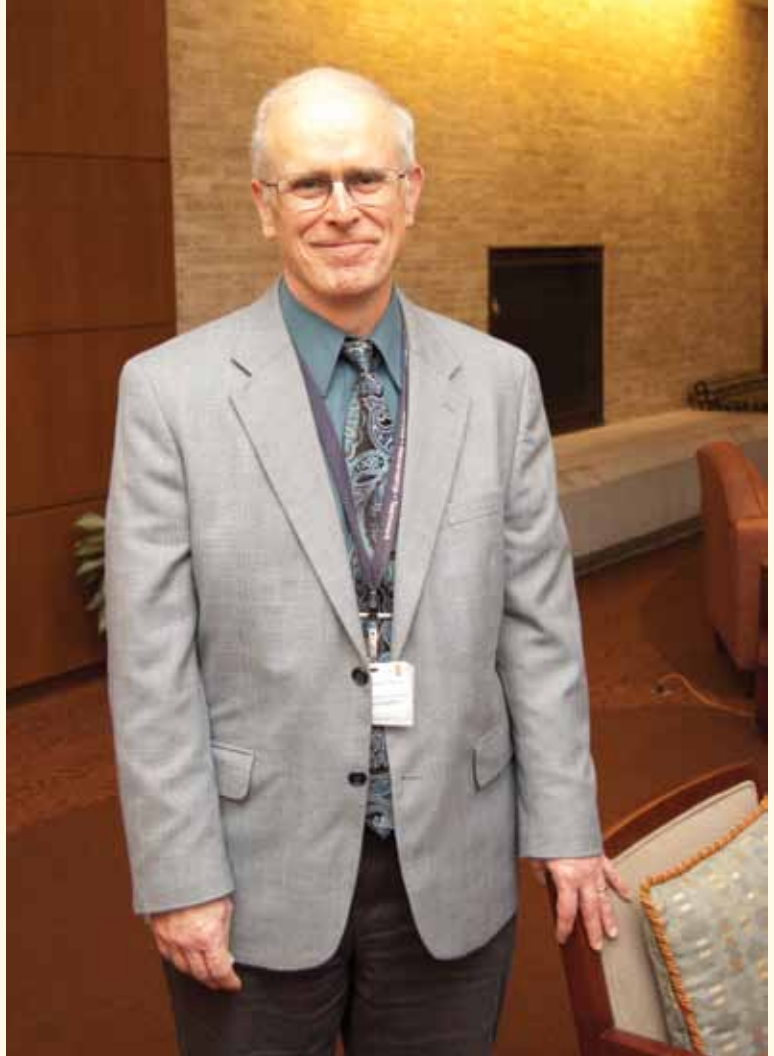


# Mike Dougherty

EXECUTIVE DIRECTOR, THE SEQUOIAS—SAN FRANCISCO

After completing college and working for a few years, Mike was wondering “is this all there is?” He consulted his career counselor, who told him to look for an employer engaged in “something meaningful.” That turned out to be working with seniors, something he has done, in one form or another, ever since. He has worked at the Sequoias—San Francisco since 1988 and has been Executive Director for 25 years. He says, “I’ve worked here long enough to have aged in place along with my elders. It has been a privilege to witness role models for successful aging. Without intending to, they have enriched my life.”

Because of his long career with NCPHS, Mike has had the opportunity to participate in more than one five-year strategic plan. “I’ve worked with residents, with staff, here at the Sequoias—San Francisco and elsewhere, in informal and facilitated groups to discuss and shape NCPHS’ future,” he says. “Each time I have been engaged, the processes have been very instructive as we consider NCPHS as a whole, and how it fits into the market place, current and future. The result of this is that I have a better understanding of how I and The Sequoias—San Francisco fit into the bigger picture.”



# Communities

Well maintained and serviced buildings are critical to supporting a community of residents. They provide a place for people to enjoy each other's company, to dine, to explore new activities and to entertain family and friends. Each of our communities is located in a very different setting, which gives prospective residents a choice of not only where but how they live. Maintaining a clean, comfortable and modern facility is a given. Creating a warm and loving home, for everyone, is what we aspire to, always.



## **NCPHS HOME OFFICE**

1525 Post Street, San Francisco, CA 94109  
415.202.7800



## **THE SEQUOIAS—SAN FRANCISCO**

Michael Dougherty, Executive Director  
415.922.9700 • [mdougherty@ncphs.org](mailto:mdougherty@ncphs.org)



## **COMMUNITY SERVICES**

Janet Howley, Vice President, Community Services & Housing  
415.351.3641 • [jhowley@ncphs.org](mailto:jhowley@ncphs.org)



## **THE SEQUOIAS—PORTOLA VALLEY**

Jay Zimmer, Executive Director  
650.851.1501 • [jzimmer@ncphs.org](mailto:jzimmer@ncphs.org)





### **EASTERN PARK APARTMENTS**

Bob Montanez, Affordable Housing Manager  
415.776.0114 • [bmontanez@ncphs.org](mailto:bmontanez@ncphs.org)



### **THE TAMALPAIS**

John Koselak, Executive Director  
415.461.2300 • [jkoselak@ncphs.org](mailto:jkoselak@ncphs.org)



### **TOWN PARK TOWERS**

Ken Yeung, Affordable Housing Manager  
408.288.8750 • [kyeung@ncphs.org](mailto:kyeung@ncphs.org)



### **WESTERN PARK APARTMENTS**

Bob Montanez, Interim Affordable Housing Manager  
415.922.5436 • [bmontanez@ncphs.org](mailto:bmontanez@ncphs.org)

*The home should be the  
treasure chest of living.*

—Le Corbusier



### **THE WOODS**

Sarah Peters, Park Manager  
707.937.0294 • [speters@ncphs.org](mailto:speters@ncphs.org)



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The Cliff House  
The Spinnaker

# Financials

## SUMMARIZED OPERATING RESULTS (IN THOUSANDS)

### REVENUES

Resident fees	
Amortization of entrance fees	
Fees for services and other income	
Investment income including realized and unrealized gains and losses on investments	
SSNC activity and support	

	2013	2012
\$	53,055	\$ 50,868
	13,870	14,437
	13,246	12,017
	23,312	6,692
	5,796	3,734
	109,279	87,748

### EXPENSES

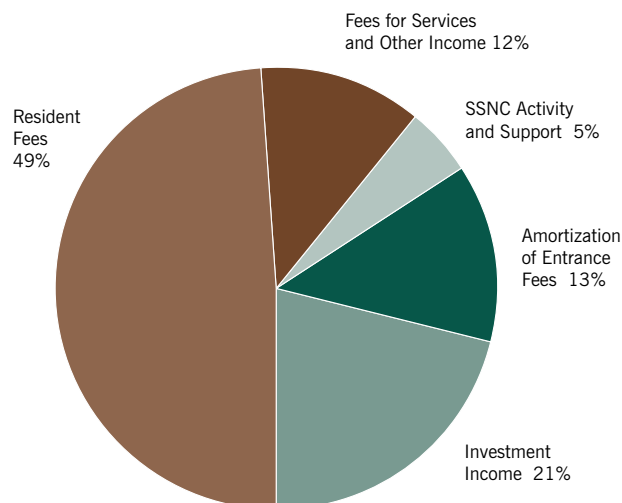
Housing
Food service
Health care
Other program services
Program support expense
Depreciation
Interest

	18,263	18,028
	12,926	12,619
	19,088	18,345
	16,787	15,074
	8,839	7,342
	8,975	8,546
	2,296	2,293
	87,174	82,247

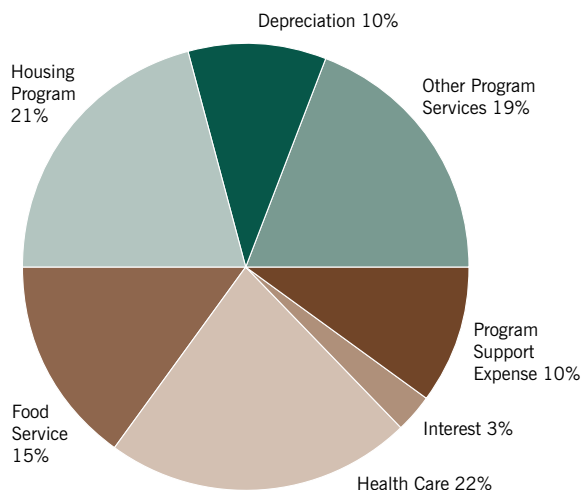
(Decrease) increase in net assets
Net assets at beginning of year
Net assets at end of year

	22,105	5,501
	(1,803)	(7,304)
\$	20,302	\$ (1,803)

## 2013 REVENUES BY SOURCE



## 2013 EXPENSES BY PROGRAM







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