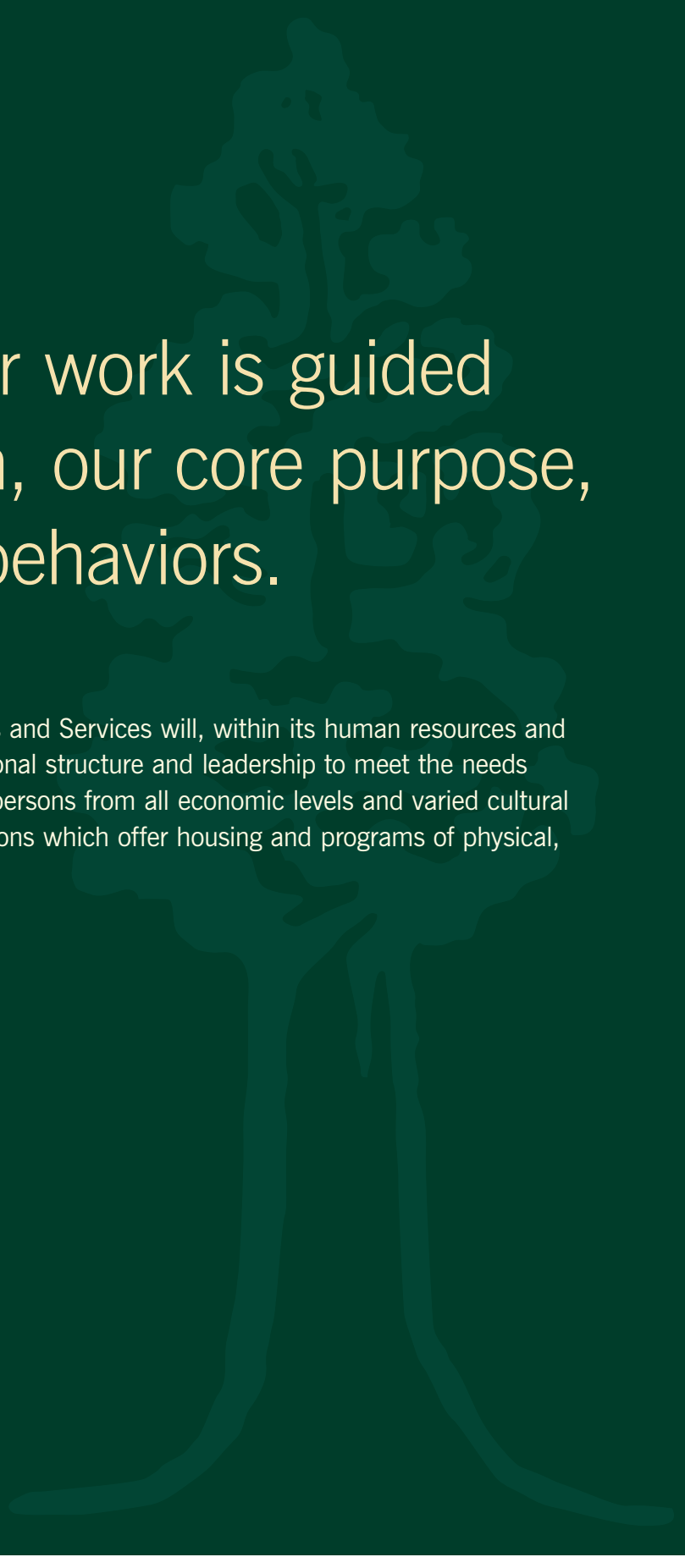




# Building Tomorrow Together

2014 ANNUAL REPORT



At NCPHS, our work is guided  
by our mission, our core purpose,  
and our core behaviors.

#### OUR MISSION

Northern California Presbyterian Homes and Services will, within its human resources and financial capabilities, provide organizational structure and leadership to meet the needs and improve the quality of life of older persons from all economic levels and varied cultural backgrounds through diversified operations which offer housing and programs of physical, social, health, and spiritual care.

#### OUR CORE PURPOSE

Enriching the Experience of Aging

#### OUR CORE BEHAVIORS

Compassionate  
Attentive  
Resourceful  
Engaged

# Transformation and Growth



David Berg, Oliver Wesson

Dear Friends,

It has been a historic year of transformation and growth at NCPHS. We bid fond farewell to our former President and CEO, Barbara Hood; moved closer to securing the property in Walnut Creek to create a new continuing care retirement community; and upgraded all of our communities to create more modern and comfortable living environments.

Together—with our residents, supporters, board members, partners, and staff—we are building a future of growth, collaboration, and innovation at NCPHS. In the pages of this annual report, you'll find a sampling of stories that illustrate our work and impact during this landmark year.

## BUILDING...

**We are building our capacity** by pursuing an affiliation with Episcopal Senior Communities. Through this strategic alliance, we will be able to expand and enhance our services for older adults throughout the Bay Area.

**We are creating environments that enrich lives.** In its first full year, The Meadows, our new memory care center at The Sequoias—San Francisco, is already having a positive impact on families and residents. With the completion of renovations at Western Park Apartments, residents now have an even more vibrant, uplifting, and safe place to call home.

## TOMORROW...

**We are designing innovation in our communities.** Together with Episcopal Senior Communities, we've taken the first steps in planning an exciting new continuing care retirement community in Walnut Creek. Our pilot hospitality program launched in two communities this year and is paving the way for a fresh initiative that will take our commitment to service to new heights.

## TOGETHER...

**We are supporting brighter futures for older adults in need.** Gifts to the Tomorrow Fund in each of our life care communities helped provide \$500,000 of confidential supplemental support for residents who have outlived their financial resources. NCPHS assisted nine staff who experienced financial setbacks through the Employee Emergency Relief Fund. Both of these funds exist because of donations from residents and staff—people who care about helping their fellow residents and colleagues.

As we move forward into the next year, we will continue to seek partnerships, build on our strong foundation, and enrich the lives of the seniors we serve.

David Berg  
President & CEO

Oliver Wesson  
Chair, Board of Directors, NCPHS



# Building



Nurse Manager Jill Dicus was there day and night to answer questions, to make suggestions, and to hold our hands when the going got tough...The love and dignity with which [the staff] treated my mother cannot be overstated.

—Joan Lefkowitz

## New Memory Care Neighborhood Feels Like Home

**At NCPHS**, home is much more than a place to live. It's a sanctuary that nurtures the body, mind, and soul. This idea is at the heart of The Meadows, our new memory care center at The Sequoias—San Francisco.

In its first full year of operation, The Meadows has already made a positive difference in the lives of people with dementia and their families. This year, we welcomed 19 residents and 16 specially trained nursing staff, and launched a personalized activities program to stimulate the mind and lift the spirit.

"It's been an amazing, once-in-a-lifetime experience," says Jill Dicus, Memory Care Nurse Manager. "We carefully selected our staff, and trained them in a person-centered approach, which means that they tailor every interaction to each resident's individual interests."

Every element of The Meadows has been designed with care. Vibrant artwork featuring Bay Area scenes adds familiarity and interest to the space. Colorful bulletin boards announce upcoming activities like live music performances, balance classes, storytelling, and trivia. And the light-filled living areas are perfect places to reminisce and socialize.

We're delighted about this new chapter at The Sequoias—San Francisco and the opportunity to help our residents enjoy excellent care and the highest possible quality of life.



## Renovations Enrich Life at Western Park Apartments

**For more than 40 years**, Western Park Apartments (WPA) has been a comfortable, secure home for low-income seniors. Thanks to a \$25 million renovation project completed this year, WPA is an even more vibrant place to live. WPA residents now enjoy a beautiful dining room, rooftop garden, light-filled library, modern computer lab, and art studio—plus upgrades to kitchens, plumbing, and electrical systems, and new double-glazed windows in all 182 units.

For many WPA residents, the improvements are more than aesthetic; they enhance health and well-being. Writer Mia Spageberg, pictured at right, uses the new exercise room three times a week. “The cardio feature on the new machines helps me monitor my heart rate,” she says. “And looking out the windows, I can soak my spirit in a steady, upbeat feeling.”

Response from the wider community has also been positive. “With our beautiful gardens and exterior plantings, we’ve created an oasis not just for our residents, but for our neighbors as well,” says WPA housing manager Bonnie Miyake.

With improvements like these, we’re helping ensure that our properties will provide comfort, safety, and enjoyment for many years to come.





# Tomorrow



## Looking Ahead THE SPIRIT OF SERVICE



**At NCPHS,** we strive to build a culture where all people—staff, residents, families, board members, and visitors—feel appreciated, engaged, and inspired. With the launch of our pilot hospitality program at The Tamalpais and Town Park Towers (TPT), our dedication to service is reaching new heights.

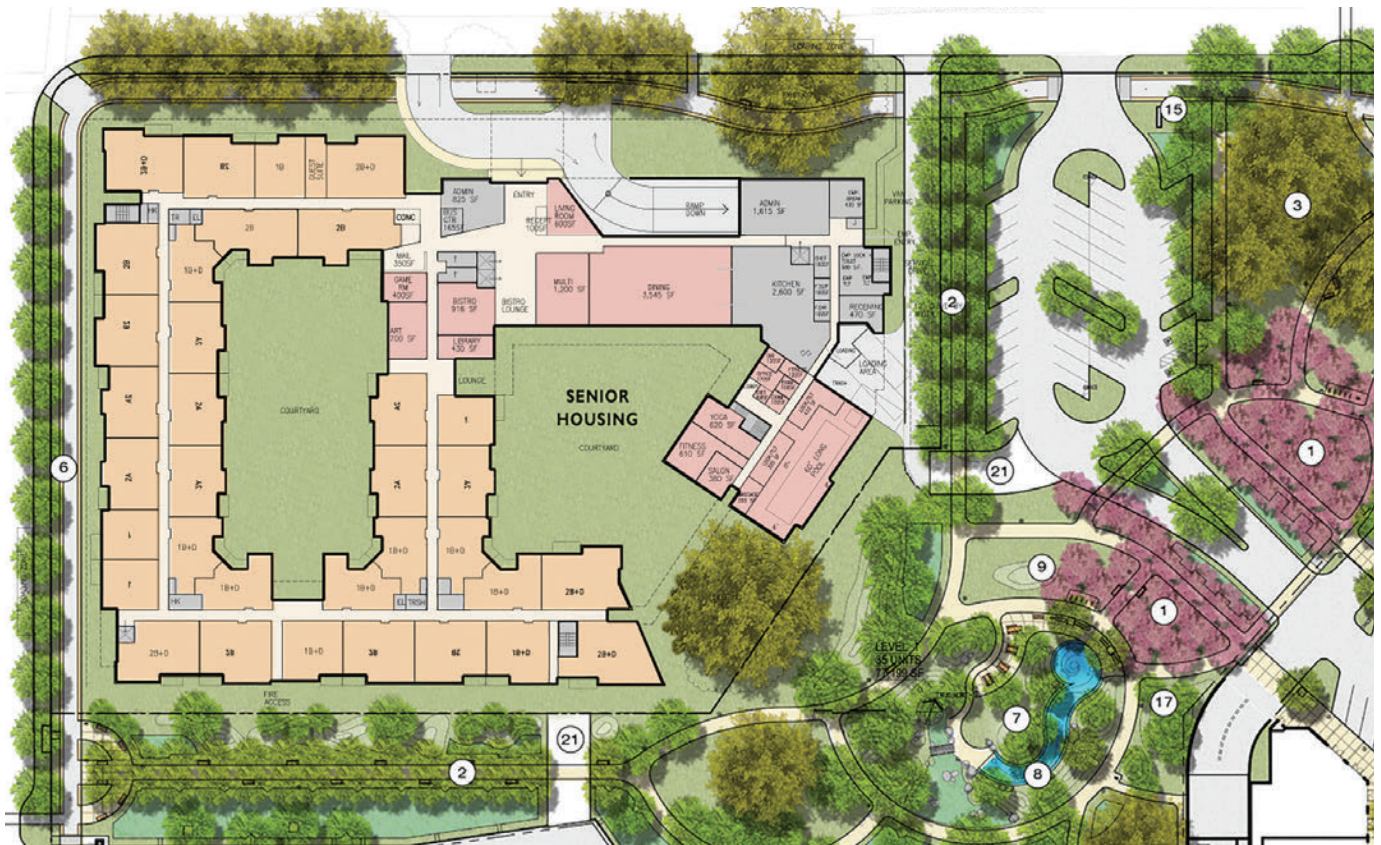
This year, TPT and Tamalpais management and staff formed Hospitality Committees, drafted service standards, and participated in workshops on identifying human needs, communicating with kindness, and handling challenges with grace.

“I use the skills I learned in the trainings every day,” said TPT staff member Miguel Tamayo. “No matter what I’m working on, I take time to connect with people and show them I care.”



The spirit of hospitality echoed throughout the year, from hospitality-themed events to a Hospitality Wall featuring stories of staff going above and beyond. This is just the beginning of NCPHS’ hospitality initiative, which will roll out across all of our communities in 2015. Look for more hospitality stories in the year to come!





## On the Horizon

### INTRODUCING VIAMONTÉ AT WALNUT CREEK

In 2014, NCPHS moved forward with planning Viamonté, a dynamic new continuing care retirement community that will be the first of its kind in Walnut Creek. The NCPHS Board approved purchase of a 3.8-acre site for the project at The Orchards, a master planned mixed-use center being developed by Terramar Retail Centers. In an exciting collaboration, NCPHS and Episcopal Senior Communities (ESC) will co-develop Viamonté. Our partnership builds on the expertise of both organizations, broadening our impact while mitigating risks.

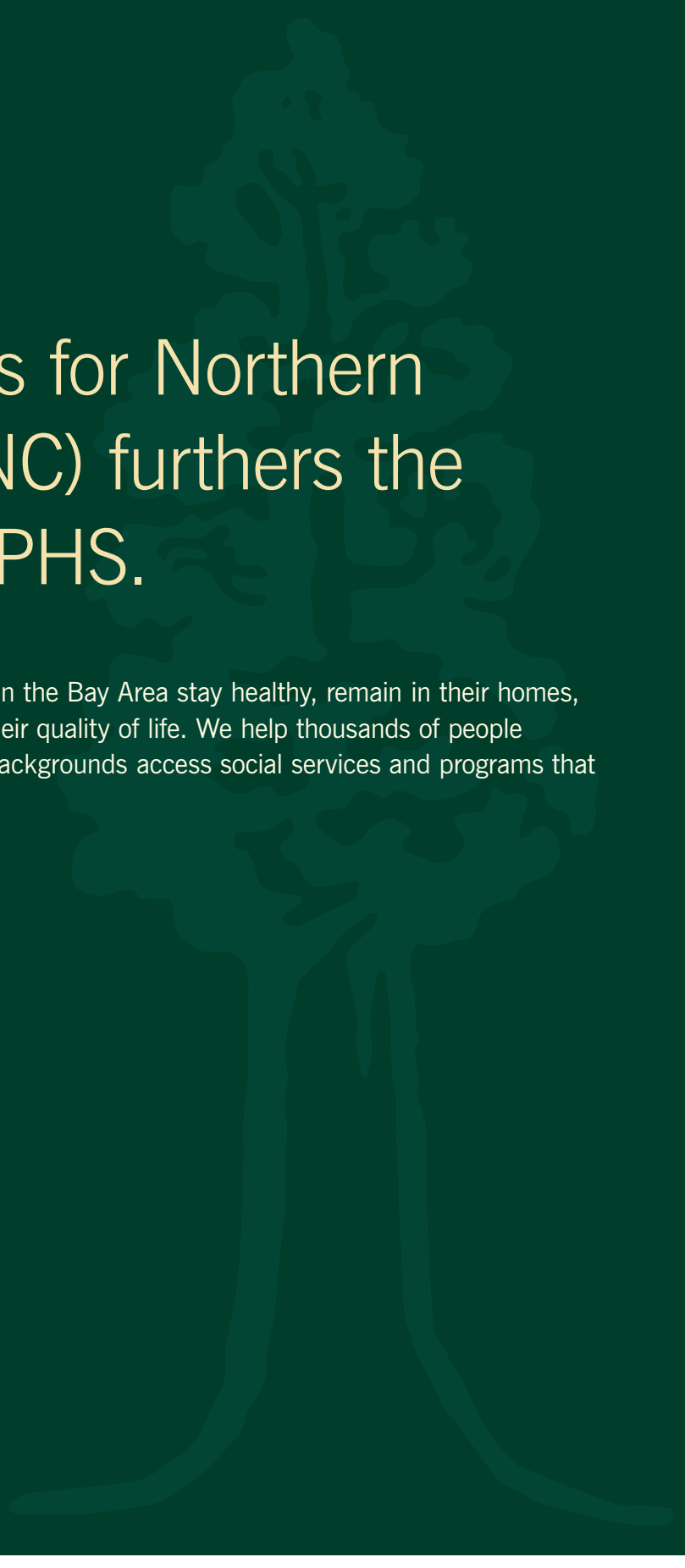
“There is a great need for senior housing in Walnut Creek,” said Dave Latina, Vice President of Business Development, pictured at right with Dee Ann Campbell, Senior Vice President of Organizational Advancement at ESC. “Together, NCPHS and ESC are leveraging our strengths to offer Walnut Creek residents an innovative option for aging in place.”

Many of today’s seniors seek a vibrant lifestyle where they can learn, grow, and engage with the wider world. At Viamonté, residents will be part of a dynamic, multigenerational neighborhood while living in style, comfort, and security. Look for more updates about Viamonté as planning continues.



With Viamonté, NCPHS and ESC are developing new approaches to senior living in one of the nation’s top senior housing markets.

—Dave Latina, Vice President of Business Development



# Senior Services for Northern California (SSNC) furthers the mission of NCPHS.

SSNC raises funds to help older adults in the Bay Area stay healthy, remain in their homes, and engage in activities that enhance their quality of life. We help thousands of people from all economic levels and cultural backgrounds access social services and programs that enrich the experience of aging.



# Supporting Brighter Tomorrows



Judith Loura, David Jamison

Dear Friends:

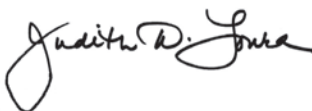
Thanks to generous contributions from donors like you, SSNC funded many worthy projects in our housing communities and throughout the Bay Area in 2014, including:

- Financial support, primarily through local foundation grants and the Gala Benefit and Raffle, for Community Services programs that reach thousands of older adults throughout the Bay Area
- Tomorrow Fund support for residents in our three continuing care retirement communities who need confidential financial assistance to remain in their apartments
- Emergency Relief Fund grants to nine NCPHS employees
- Four computer stations for residents at Town Park Towers, one of our three affordable housing communities
- Funding for an art program for residents at Western Park Apartments
- Exercise equipment for The Tamalpais and Sequoias–San Francisco resident fitness rooms
- Funding for a copy machine for the resident business office at The Sequoias–Portola Valley library
- Sponsorship for the first San Francisco Senior Center Pier to Pier Walk

This year, total cash and stock donated to Senior Services for Northern California was \$2,327,386. Planned gifts secured a total of \$269,250, for a grand total of \$2,596,636.

Your donations to SSNC help us keep our promise to meet the needs of and improve the quality of life for older persons in our residential communities and in the greater Bay Area.

In 2015, we'll continue to expand our efforts to build brighter tomorrows for Bay Area seniors. Thank you for caring about older adults in the Bay Area and supporting our mission to enrich and improve their lives.



Judith Loura  
Executive Director



David Jamison  
Chair, Board of Trustees

# Together



## AARP Experience Corps® Marin

AARP Experience Corps® Marin trains, places, and provides on-going support to adults 50 and older who serve as reading and literacy tutors and mentors to students in elementary schools.

### OUR IMPACT:

**100**  
volunteers provided  
**10,848**  
hours of tutoring to  
**1,400**  
students in 8 schools

**96%**  
of teachers report that our tutors had a moderate or strong impact on student literacy

**97%**  
of tutors report that the program increased their sense of purpose in life

## Opening the Doors to Reading

DOUG BROWN, VOLUNTEER TUTOR,  
AARP EXPERIENCE CORPS® MARIN

### Experience Corps® Marin volunteer Doug Brown

understands that education is the key to positive change. He's been changing the lives of students at Sun Valley Elementary School for five years. Twice a week, Doug tutors Sun Valley second graders in basic reading and writing skills. He and the students read to each other, answer questions about what they've read, and practice using new words.

"Encouraging new readers is fun, particularly when I allow each student's imagination to run wild," Doug says. "We apply what we've learned to the things that are most interesting and important in their lives."

For Doug, volunteering with Experience Corps® Marin is a natural match. A voracious reader who views retirement as an opportunity to give something back, Doug loves helping the next generation discover the joys of reading. This year, Doug's dedication and service earned him a nomination for Heart of Marin's Volunteer of the Year.



I am so happy to be working with Mr. Doug. He's my best adult friend. He's interesting, pretty fun and so nice to read with.

—One of Doug Brown's second grade students





## San Francisco Transitional Care Program (SFTCP)

SFTCP assists seniors and disabled adults who are discharged from hospitals but are at risk of readmission. Our coaching model helps clients set recovery goals, better understand their health issues, schedule follow-up medical appointments, and develop comprehensive Wellness Plans to help them take charge of their own healthcare.

### OUR IMPACT:

**2,419**

individuals received transitional care services

**1,970+**

hours of emergency home care assisted

**650+**

individuals

**1,650+**

transportation vouchers distributed for follow-up medical appointments

**18,000+**

home-delivered meals to

**645+**

individuals

## Building Bridges for a Strong Recovery

QUAN TRAN, CLINICAL COORDINATOR,  
SAN FRANCISCO TRANSITIONAL CARE PROGRAM

**After an emergency hospital stay,** Andrea, an SFTCP client, faced a host of challenges. Fortunately, Quan Tran was there to support her recovery every step of the way. Quan worked with Andrea and her husband John to create a wellness plan, obtain transportation assistance, and prepare for Andrea's follow-up medical appointments. Quan also provided the couple with a transfer bench and coached John on how to assist Andrea with her daily activities.



“Thank you, Quan! You came to the hospital and gave us the assurance that you would be there for us. The resources and counseling information you provided are tremendously valuable. We are now better prepared to navigate through the process of recovering from a hospital stay.”

—John and Andrea, SFTCP Clients



## San Francisco Senior Center (SFSC)

SFSC is the nation's oldest nonprofit senior center, offering classes, workshops, fitness programs, nutritious lunches, and critical social services to older adults at its Aquatic Park and Downtown Centers. Every year thousands of participants come through SFSC's doors for socialization, companionship, and intellectual, physical, creative, and emotional stimulation.

### OUR IMPACT:

**2,000**

older adults were provided services and activities

**30,560**

meals served to seniors

## Reaching Out, Giving Hope

GINGER MARTIN, SRO COMMUNITY OUTREACH  
WORKER, SAN FRANCISCO SENIOR CENTER

**For low-income seniors** who live in San Francisco's single room occupancy (SRO) hotels, social isolation can be a fact of life. Many lack access to services, food, and opportunities to connect with others. To make matters worse, many elevators in SROs are unreliable—which can leave older adults and people with disabilities stranded in their apartments.

San Francisco Senior Center's Ginger Martin is working to change this. Ginger provides older SRO residents and SRO managers with information about the Downtown Center's noontime meals. She also advocates for SRO safety and elevator repair.

When she began her work last year, Ginger's goal was to connect 50 SRO residents with the Downtown Center. To date, 89 new SRO residents have come through the Center's doors—and the number continues to grow.



I believe that even in the most difficult situations there is hope. I try to reach people and give them hope.

—Ginger Martin,  
SRO Community Outreach Worker





## Social Services and Case Management

The **Living at Home Program** connects social workers with seniors and people with disabilities to help them gain access to available health, financial, and other support services. Through the **Services Connection Program**, NCPHS social workers help residents in San Francisco Housing Authority senior and disabled housing communities gain access to the services they need to remain self-sufficient and housed.

### OUR IMPACT:

**6,521**

residents participated in health and wellness programs

**83**

clients received care coordination support to live independently or transition to another level of care

**3,064**

low-income housing residents connected with referrals and services

**25**

senior housing communities served

## Make a Difference

### GIVE A GIFT TODAY

Your donation to Senior Services for Northern California helps NCPHS provide services that improve the quality of life for older persons in our residential communities and in the greater Bay Area.

### LEAVE YOUR LEGACY

You can give a gift that will touch people's lives for generations to come. Contact Judy Loura, SSNC Executive Director, at 415.202.7805 or [jloura@ncphs.org](mailto:jloura@ncphs.org) to learn more.

### DONATE YOUR VEHICLE

Turn your old car into a vehicle for positive change! SSNC's car donation service accepts cars in good running condition. We make the donation process easy—and you get a tax write-off. Contact Scott Metzger at 415.351.3601 or by email at [smetzger@ncphs.org](mailto:smetzger@ncphs.org) to learn more.

### CELEBRATE AND CHANGE LIVES

**Save the Date:** The NCPHS Annual Gala takes place on Tuesday, October 6, 2015, from 4:30 – 9:00 p.m. at the St. Francis Yacht Club in San Francisco. For tickets or event sponsorship information, contact Jenna Graber at 415.202.7819 or by email at [jgrabber@ncphs.org](mailto:jgrabber@ncphs.org).

### LEARN MORE

There are many ways to support SSNC. To learn how you can give a gift that touches lives, contact Judy Loura at 415.202.7805 or [jloura@ncphs.org](mailto:jloura@ncphs.org).

### WHY I GIVE

“Having a positive impact on people's lives has always been important to me. When I learned how NCPHS community service programs help older adults in need, I knew I wanted to support this work. It's gratifying to know I'm helping to make a difference, both here at The Sequoias and in our wider community.”

—Ruth Nolte, resident of The Sequoias—San Francisco and Omega Circle member

# Our Donors

Thank you for your support! We have made every effort to ensure that our donors are accurately recognized. If we have made an error in our reporting, please let us know by contacting Judy Loura at 415.202.7805 or [jloura@ncphs.org](mailto:jloura@ncphs.org).

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# Financials

## SUMMARIZED OPERATING RESULTS (IN THOUSANDS)

### REVENUES

	2014	2013
Resident fees	\$ 54,978	\$ 53,055
Amortization of entrance fees	14,550	13,870
Fees for services and other income	13,161	12,706
Investment income including realized and unrealized gains and losses on investments	(11,153)	23,312
SSNC activity and support	3,729	5,795

75,265 108,738

### EXPENSES

Housing	18,313	18,263
Food service	13,564	12,926
Health care	19,605	19,088
Other program services	16,108	16,787
Program support expense	8,239	8,190
Depreciation	9,415	8,975
Interest	2,533	2,296

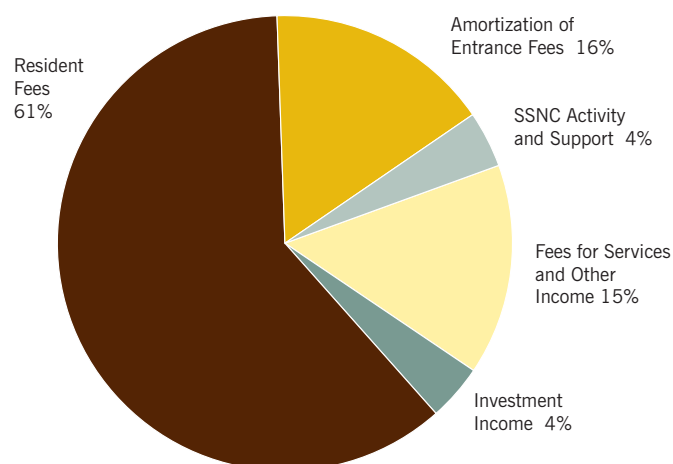
87,777 86,525

(Decrease) increase in net assets (12,512) 22,213

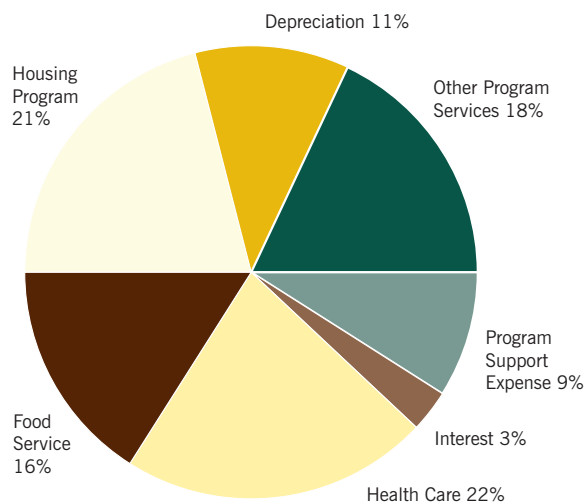
Net assets at beginning of year 20,410 (1,803)

Net assets at end of year \$ 7,898 \$ 20,410

## 2014 REVENUES BY SOURCE



## 2014 EXPENSES BY PROGRAM



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