



2019 Annual Report



A REPORT TO THE COMMUNITY

Message from the CHAIR

I am so proud of our impact on so many seniors in North County. In 2019, The Foundation for Senior Wellbeing focused on doing what we do best: helping older adults one-on-one through our Information Resource Center services. We counselled 322 individual clients, on a variety of issues, from housing to transportation to legal issues.

The Senior **Information Resource Center**, led by program manager Rebecca Steiner and our group of dedicated senior volunteers, experienced a 22% increase in the number of clients. We hope to continue to get the word out about our free services as we aim to grow the number of clients in the coming year.

Additionally, our **Programs and Services Committee** explored new ways to serve seniors, especially those who are isolated or lonely. The result is a new monthly program, “Senior Spotlight Series: **Coffee Connection**,” which launched in early 2020 and will be offered for free to seniors. I hope the series will become a go-to event for seniors looking to make new friends, connect over shared experiences and maybe learn a bit about how to navigate life as they age.

After years in partnership with the San Diego County’s Aging and Independent Services, The Foundation earned the Live Well Partner Recognition and was honored on Nov. 23 with a proclamation. Live Well San Diego unites partners from all sectors by working together to develop a region that is Building Better Health, Living Safely and Thriving. We are proud to play a role in this collective effort to help all 3.3 million San Diego County residents live well.

Our active board of directors and committee members continued to guide the organization toward financial stability. Thank you to the hard work of these volunteers, our two celebration events were enjoyed by many families and friends. More than 175 donors, supporters and in-kind contributors helped ensure the success of **Tribute to Traditions** in May and **Festival of Trees** in November.

In 2018, we launched a new program to **prepare seniors for emergencies** and last year we continued to bring the program to groups of seniors. Again, funding from the San Diego County Community Enhancement Grant program provided participants with free “Go Bags” containing food, water and emergency supplies. Know about a community that can use this presentation? We’d love to reach new groups.

We appreciate the on-going support from the **Panorama Teen and Family Resource Center** who provide us with office and meeting space where we can work to enhance community partnerships such as the **North County Community Action Network (NorCAN)**, which meets at the center monthly.

We continue to serve the recreational needs of local seniors by running **Bingo** games each Wednesday. Last year, about 55 seniors each Wednesday joined our team of 10-15 volunteers at the San Marcos Senior Activity Center.

As I wrap up my final year as Board Chair, I am proud of our committed staff and volunteers who are key to the growth of the organization as they serve an ever growing population of seniors with such compassion.



Honorees at Tribute to Traditions May 21, 2019



Guests at Festival of Trees on Nov. 23, 2019

WHAT WE DO

The Foundation for Senior Wellbeing links seniors, caregivers and their families to resources and services to improve seniors' quality of life.

HOW WE DO IT

Staff and volunteers operate a **Senior Information Resource Center** that provides free support—both in-person and by phone—in the areas of:

- Housing
- Home repair
- Caregiver support
- Transportation
- Food/nutrition needs
- Emergency and crisis assistance
- Medical or mental health issues
- Legal issues
- *and more*

Our **Senior Emergency Preparedness** programs teach seniors what to do in the face of an emergency.

The **Senior Crisis Fund** directly impacts those seniors most in need of financial help.

Bingo at the San Marcos Senior Activity Center promotes social interaction and helps brain health.

Our new **Coffee Connection** program is a monthly gathering for older adults to meet new friends, connect over shared personal experiences and discover tips about successful aging.

WHY WE DO IT

We provide compassionate support and advice for older adults, or their families, when they most need it. We hear from seniors every day that often can't find help or the resources they need elsewhere. The problems are complicated, and finding a solution takes hands-on guidance supported by patience, persistence and empathy. The Foundation is a lifeline for these clients and for their concerned family members.

BY THE NUMBERS



In 2019, the Information Resource Center directly helped 322 clients.



Average client age:
73



Case load
increased by 22%
(2019 vs. 2018)

Geographic locations:

26%	San Marcos
25%	Oceanside
13%	Escondido
11%	Vista
4%	Carlsbad
4%	homeless
1%	Encinitas
1%	Fallbrook
1%	Rancho Bernardo
14%	other North County communities



Issues reported:

42%	Housing
12%	Caregiver support
11%	Home repair
9%	Legal issues
8%	Transportation
6%	Medical, dental or mental health issues
4%	Emergency assistance
4%	Food/nutrition needs
4%	Miscellaneous



55+ participants in
Bingo each week.

81% of clients reported
their experience was
either “extremely
satisfactory” or
“satisfactory”



PROGRAM HIGHLIGHTS

In addition to the Information Resource Center, the Foundation for Senior Wellbeing prepared more than 80 seniors **for natural disasters and emergencies** in April, 2019. The program continues in 2020.

We honored four awardees in May 2019 at **Tribute to Traditions** and celebrated a year of accomplishments at **Festival of Trees** on November 23, 2019. These important celebration events allow us to share our stories with the community and raise support for the Foundation.

In partnership with the San Marcos Senior Activity Center, we provide Wednesday **Bingo** for hundreds of seniors.

Twenty families received direct financial support through the **Senior Crisis Fund**, a program coordinated by partner Interfaith Community Services. Examples of support include utility bill assistance, rental subsidies and small home repair funding.



LOOKING FORWARD

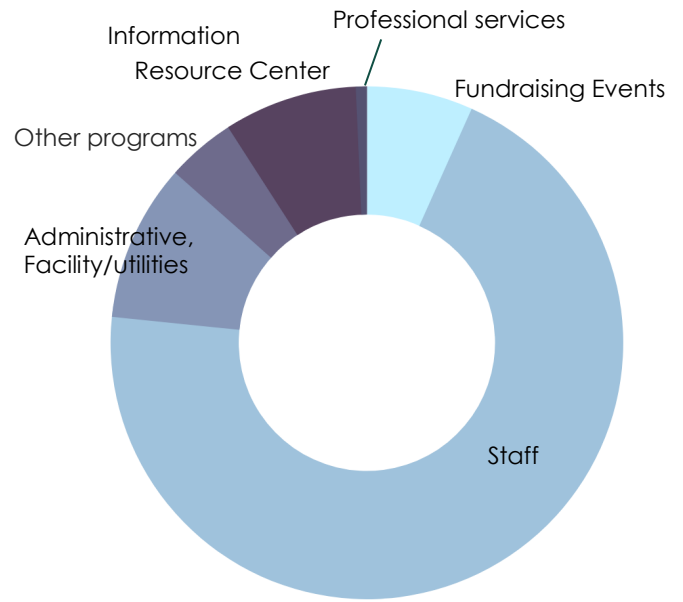
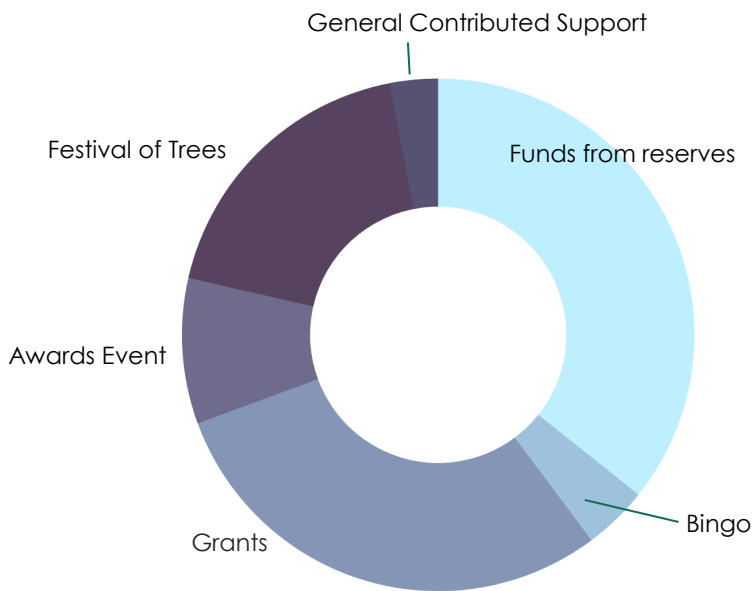
In 2020, the Foundation is launching the Senior Spotlight Series, a monthly **Coffee Connection** gathering. This free program brings together seniors in a fun setting to share common experiences, make new friends and find their community.

When funding is finalized a new pilot program called **The Friendship Tree** will connect seniors together by phone to combat loneliness.

2019 FINANCIALS

Total Revenue: \$99,612.00

Total Expenses: \$99,297.00



Income	
Funds from reserves	\$35,000.00
General contributed support	\$4,029.00
Grants	\$29,945.00
Tribute to Traditions	\$9,607.00
Festival of Trees	\$18,011.00
Bingo	\$3,020.00
TOTAL	\$99,612.00

Expenses	
Information Resource Center	\$6,655.00
Staff (wages/salaries)	\$69,424.00
Fundraising events (Festival of Trees/Awards Celebration)	\$9,857.00
Other programs (Emergency events, Bingo)	\$4,314.00
Administrative expenses/ Facility & utilities	\$8,352.00
Professional services	\$695.00
TOTAL	\$99,297.00

2019 BOARD OF DIRECTORS

Alison Driessen, Chair
Retired Registered Nurse /
Senior Advocate

Audrey Kelly, Vice Chair
Retired / Senior Advocate

Rachel Currington, Secretary
Edward Jones

Tamra Atwood
Senior Care Management Advisor

Tom Cowan
Senior Advocate

Bryan Devore, incoming Chair
Real Estate Agent, Founder Senior Savers

Tiffany Filippi
La Paloma Healthcare Center

Fritzi Gros-Daillon
Household Guardians

Ken Krieger
Retired Social Worker /
Senior Advocate

Vanessa Valenzuela
Community Activist / Controller

LIVE WELL Recognized Partner

The Foundation was honored as a recognized partner with the San Diego County LIVE WELL program in November. LIVE WELL San Diego unites partners from all sectors by working together to develop a region that is Building Better Health, Living Safely and Thriving.



Meet Jim

Jim, 73, called in and shared he was experiencing loneliness after the death of his wife and wanted to find out if there were any social activities in the area he might attend. He was given information on the local senior centers' activities in his city of residence as well as the new Coffee Connection program at the Information Resource Center. We continued to follow up with him to make sure he was pursuing new social opportunities. *Jim was looking forward to making new friends.*

Meet Sue

Sue had been living in her car because she felt safer in it than she did when she lived in an apartment in a not so good area of her city, but she was experiencing more health problems and needed to find better accommodations. Our volunteers helped connect Sue with shelters that were not full and with a community homeless outreach person who was able to connect her to a counterpart in mid-San Diego county. That person was able to get Sue started with her application and paperwork for an affordable unit in that area. *Sue was excited to finally be able to see the light at the end of the tunnel.*

THANK YOU to our Donors (contributions of \$100 and more)

Alison Driessen & Family	Dolores Fry	La Moree Homeowners Assn.	Patricia Spire
Amy & Kevin Duffner	Emily Stitt	La Villas de Carlsbad	Pauly Schoolcraft
Audrey Kelly	Fairwinds Oceanside	Laura Barish	Peg Basom
Barbara Fischer	Fritzi Gros-Daillon, Household Guardians	Laura Walls and Family	Rachel Currington
Barbara Rangan	Helen Stamatelatos	Lela Hankins	Rebecca & Richard Steiner
Bayshire Senior Communities	Heritage Hills	Linda Diller	Redwood Terrace
Becky Noel	Ian Balesky	Lisa Brown	Robert & Rosemarie Woldin
Bonnie Groth	James & Catherine Hoffman	Lisa Kaufman	San Marcos Chamber of Commerce
Brenda-Lee Smith	Janet File	Lisa Lipsey	Shelly Waldhelm
Brookdale San Marcos	Jenny Cole	Lori Beach	Silvergate Retirement Residence, San Marcos
Bryan Devore, Senior Savers	JoAnn Hayden	Lori Olivas	Tamra Atwood
Byron Marler	Joe Ayooob	Lucia Son	The Benson Family
Care Choice Home Care	John & Charlene Smylie	Lucy Wheeler	The Meridian - Pacifica Senior Living San Marcos
Carl and Lee Kolker	Jonathan Frankel	Marie Becker	Tiffany Filippi
Carmen Sanchez, Right at Home	Judith Schnack	Melissa Sorenson	Tom Cowan
Cathy & Mike Ellis	Kathleen Bescher	Merrill Gardens	Vanessa Valenzuela
Charlene Vick, Windward Life Care	Kathy Barton	Mobile Physical Therapists	Veronica Baker
Citracado Dental Group	Kathy Meck	Monica Demler	Vickie Braden
Cypress Court	Katrina Maginn	Nancy Wilson	Victoria DePrez
Deborah Sollohub	Ken & Mary Krieger	Nina Vincent	Westmont Town Court
Deborah Thompson	Kiana Fukuda	Ocean Hills	
Dennis Kluesener	Kim Borio	Pacific Senior Living Oceanside	
	Kirk Effinger	Pacifica Senior Living Vista	

THANK YOU to our Partners and Supporters

Partner and referring agencies: Senior Centers in Carlsbad, Encinitas, Escondido, Oceanside, San Marcos and Vista.



2019 grantors: San Diego County Board of Supervisors Community Enhancement Grant program, the Encinitas Community Foundation, the William and Ruth Tippetts Foundation, the Staples Foundation, and the Walmart Community Foundation. *2019 Sponsors and donors:*



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Newland
COMMUNITIES

