The extended NCPHS family, including residents, staff, Board members, individual, foundation and corporate supporters, engages in countless acts of selfless giving—and receiving—every day of the year. This Annual Report focuses on only a few from 2011. For every gift of time, money and caring there is a gift in return. The result is an unbroken circle that knits us together.

To bring some focus to an all-encompassing subject, this Report is organized around the theme of The Spirit of Giving. This Report has all the usual sections: financials, a list of donors, and major developments from 2011. In addition, there are a series of profiles that illustrate this spirit that infuses everything we stand for.

These profiles are snapshots, points in time. They do not, and cannot, capture the full scope of giving within the NCPHS family. But they hopefully illustrate its importance and its effect on all members of this community.
2011: The Trends are Positive

2011 BROUGHT NCPHS many new successes. We finished the year with a combined 93% occupancy in our Continuing Care Retirement Communities. Our affiliation with the San Francisco Senior Center (SFSC) strengthened our outreach to seniors in the Bay Area. SFSC offers meals, social services, exercise programs and health screenings. The Board of NCPHS reaffirmed its commitment to affordable housing by approving the refinancing of Western and Eastern Park Apartments in San Francisco and Town Park Towers in San Jose. These properties will be upgraded and refurbished over the next several years.

NCPHS extends its reach to all seven communities in which our properties are located. For example, we partner with the San Francisco Housing Authority to provide social workers in 15 of their senior housing communities. We work with area hospitals to implement the HomeComing Transitional Care Program that coordinates care for isolated low-income seniors returning home from the hospital. Our Community Services department provides direct services and advocates for seniors in Sacramento to benefit residents in all of our communities.

The theme of this year’s Annual Report is The Spirit of Giving. The effects of individual giving are readily seen inside our communities and beyond. Residents, staff, and Board members give in many ways throughout NCPHS, including contributions to senior programs, planned gifts to support the Tomorrow Fund for residents who have outlived their financial resources, and volunteering for local nonprofits.

We’ve captured the spirit of giving in words and pictures from our residents, board members, and staff. The biggest difficulty in assembling this report was selecting only eight from among hundreds of people. The NCPHS family’s influence and generosity extend far beyond our buildings, creating a lasting and profound impact on Bay Area seniors.
Social Accountability and Community Services

NCPHS programs serving the larger community expanded dramatically this year with the addition of complementary programs administered by the San Francisco Senior Center (SFSC). In the first full year of our affiliation, the number of seniors served by our programs has grown to well over 10,000. The following are brief summaries of the main programs offered by NCPHS and SFSC:

**Experience Corps® Marin** is a mentorship and tutoring program connecting older adult volunteers with elementary school-aged students from low-income neighborhoods in Marin.

**Coming of Age: Bay Area** helps nonprofit organizations build capacity that allows them to do more with less and helps individuals aged 50+ to explore meaningful community service.

**Service Coordinator for Peninsula Volunteers Meals Program** provides a Service Coordinator (social worker) for older adults to assess health and social services they might need.

**The Living at Home Program and the Services Connection Program** place social workers in Bay Area residential communities to help seniors and disabled residents access much-needed social services and to age in place.

**WellElder®** provides low-income seniors with access to community health and medical care, enabling them to remain independent for as long as possible.

In 2011, we affiliated with the San Francisco Senior Center (SFSC) to broaden our outreach to seniors. The following programs are offered at SFSC’s Aquatic Park and Downtown centers:

**Case Management** stabilizes, supports, and monitors clients needing long- or short-term care until they can manage independently or appropriate services are located and arranged.

**HomeComing Transitional Care Program (HTCP)** is a free hospital-to-home transitional care program that supports low-income, frail, and isolated seniors and adults with disabilities who have no support system after a discharge from a hospital or acute care facility. The first 24-36 hours post-discharge are crucial to a client. The HTCP can provide immediate care services that can be set up before or immediately after discharge.

**Project Open Hand** provides nutritious lunches for a suggested donation of $2. The lunches are available at Aquatic Park Senior Center Monday–Friday and Sunday, and at Downtown Senior Center every day.

**Senior Literacy Project (SLP)** provides free English as a Second Language (ESL) classes, basic English reading, writing, and communication skills to seniors who are functionally illiterate in English, and literate life skills classes. Individual peer tutoring and translation is available at both SFSC Centers.

**Free Services** include educational presentations on healthy living, legal services, understanding Medicare, and a yearly “Senior Survival School” where seniors receive current information on transportation, housing, insurance, and social security.

In addition to this comprehensive programming, NCPHS has addressed the needs of its residents and staff by creating a series of initiatives that fulfill its mission of “improving the quality of life for older persons.” The first two of these have been in existence for several years:

**Commitment to Inclusion** provides a framework and convenes regular meetings designed to celebrate the differences and similarities shared by everyone in the NCPHS family. The goal is to ensure that all persons are valued and treated with respect.

**Commitment to Spirituality** recognizes that spiritual yearning is at the core of our humanity. It reflects a sense that something more than human efforts is at work in the world. Though unique and deeply personal, the expression of this need is recognized, appreciated, and nurtured among residents and staff alike.

**Commitment to Wellness:** In 2011, we began a Wellness Initiative that encourages good health in all aspects of life. This new series serves as a forum for understanding the concept of wellness and how best to incorporate the practice at each community. It accompanies the Inclusion and Spirituality Initiatives to create a complete vision of care for our residents and staff. The benefits of this initiative will begin to be felt by everyone in the coming year.
Senior Services: A Good Year

ALTHOUGH 2011 WAS a challenging year, particularly because of the economy, Senior Services for Northern California (SSNC) was able to fund several important programs. Cash and stock donated totaled $1,286,813 and planned gifts totaled $803,167 for a grand total of $2,089,980.

Residents donated $617,195 to the Tomorrow Fund and Tomorrow Fund Endowment at our three life care communities that provided confidential financial support to 15 of our CCRC residents who have outlived their financial resources.

Our ninth annual Gala Benefit event, hosted by The Sequoias-Portola Valley, netted a record $155,000 in support of Community Services Programs. We serve more than 10,000 seniors throughout the Bay Area with wellness, social service, and community engagement programs through our Community Services Programs.

The annual Angel Appeal, held in July for the first time, raised $38,085 to support Community Services and the NCPHS Unrestricted Fund. This is an increase over last year’s record amount.

Fifteen planned gifts were completed for a total of $803,167. These included three Charitable Remainder Trusts and 12 Charitable Gift Annuities.

A total of $466,876 was allocated to our seven senior housing communities for various projects and programs that improve the residents’ quality of life.

Your donations allow us to help older adults in need of financial, health, and social assistance.

Thank you for your support of our work to help others.

JUDITH LOURA, CFRE
EXECUTIVE DIRECTOR

DOROTHY PETT
CHAIR, SSNC TRUSTEES
Out in Front: Building Capacity and Collaborations

FOR DEVELOPERS, 2011 was a year of finding certainty in the uncertain times of the new economy. NCP Senior Ventures, LLC (NCP-SV), the limited liability company created by NCPHS in 2008 to develop new communities, pursued certainty in 2011 by focusing on building capacity and collaborations.

To build capacity, NCP-SV continued to track several new development opportunities including proposals for Continuing Care Retirement Communities in Foster City and the South Bay. As a result of these focused efforts, NCP-SV strengthened and sharpened its ability to efficiently pursue new senior living opportunities. NCP-SV also continued to develop its operating capacity by providing comprehensive, yet disciplined Management Services to Kokoro Assisted Living community.

To build collaborations, NCP-SV continued to leverage NCPHS’ 53 years of operating expertise and create strategic partnerships with market-rate and affordable real estate development partners such as Sares Regis Group, Mercy Housing California and community-based organizations such as the San Francisco Zen Center.

NCP-SV continues to stay out in front by developing capacity and building collaborations. The Board and staff are positioned to expand the possibilities for competitive and sustainable senior living communities. We will achieve this by creating thoughtful and disciplined solutions to caring for and serving elders in a rapidly growing yet constantly changing senior living market.
Our Community

The following pages present a series of stories drawn from the life experiences of residents, staff and Board members whose support is critical to the well-being of everyone in our communities and beyond.

What is perhaps unusual about these examples of unselfish giving is that these stories are commonplace. There are thousands of people involved with NCPHS in some meaningful way. Each one has his or her own narrative.

These eight entries are just a piece of the fabric of NCPHS.

Real generosity toward the future lies in giving all to the present.
—Albert Camus
WHEN SHE MOVED into Western Park Apartments (WPA) in 1995, Joyce Lieberman was, in her own words, “very physically ill.” With a secure and affordable place to live and excellent doctors, she gradually regained her health. The road to WPA was preceded by a full and varied life: work as a high school English teacher, a professional palm reader, and an employment counselor placing workers in brokerage firms.

At WPA, Joyce has held every office open to residents, and more recently she volunteered at the Phoebe Hearst pre-school directly across from WPA. “But after Phoebe Hearst I was looking for something new,” said Joyce.

The something new turned out to be the Free Farm, an urban farm founded in January 2010 by a number of non-profit organizations in San Francisco. Located near WPA on a 1/3 acre lot at the corner of Gough and Eddy Streets (loaned to the group by St. Paulus Lutheran Church), the Farm receives no government funding and is completely operated by volunteers. All of the produce raised is organic and is given away every Saturday to whoever wants and needs it.

Joyce volunteers every Saturday and “because my mouth works better than the rest of me,” she acts as the greeter, directs visitors to food supplies, and educates others on the underlying philosophy of The Farm and opportunities for volunteer work. She has also always edited a gazette-type newspaper for WPA. “We are proud possessors of the English language and we should practice both speaking and writing it,” she says.

Joyce calls herself “a rich bag lady.” While she is low-income, she has her needs met by the safety net provided by subsidized housing at WPA. In return for all she has been given she takes great pleasure in supporting many charities, among them public radio and television, the San Francisco Public Library, and many other art and research projects.

“Know yourself and know others,” Joyce says. “Community living offers a wonderful opportunity to do both.”
Think of giving not as a duty but as a privilege.

John D. Rockefeller, Jr.
NIAN CI CAME FROM Canton, China to the United States in 1993. She worked as a pharmaceutical technician and settled in San Jose where she lived with her daughter. In 2009 Nian Ci began exploring senior housing because her daughter planned to go to school in Los Angeles. Her love of volunteering had already taken the form of serving meals at the Senior Nutrition Program in San Jose.

Her search for a new home was wide because she could only afford communities that offered Section 8 housing. She was helped by her cousin who lives in San Francisco, who was aware of some affordable housing options. Nian Ci arrived at Eastern Park Apartments knowing no one but found that residents went out of their way to make her feel welcome. “Everyone, including the staff, is friendly and helpful. I appreciate the 24-hour security and the spacious and clean apartments.”

From her first day, Nian Ci let the staff and fellow residents know she wanted to help in any way she could. She was quickly taken up on her offer and now juggles many different projects. “Because I am younger than many of the others at Eastern Park, I run errands for people like picking up prescriptions. I set up for all of the parties and birthdays, help with the weekly Karaoke Club sessions and exercise classes, cook for those who can’t and translate all of the postings and announcements from management for residents into Chinese.”

It seems clear that Nian Ci’s long list of responsibilities will only grow longer. She embodies the best of giving to her friends and fellow residents.

To give without any reward, or any notice, has a special quality of its own.

Anne Morrow Lindbergh
Kay Harrington
THE SEQUOIAS – SAN FRANCISCO

KAY MOVED INTO The Sequoias–San Francisco in 2000 after giving the decision some very serious thought. “Being single, I did not want relatives to be burdened with caring for me as I aged. I had already cared for my mother until she died and knew that, at best, it can be difficult.”

Although born and raised in San Francisco she wanted to make sure it was right for her retirement. “I looked at places in Oakland and Marin County and elsewhere and thought ‘Why would I leave the City that I love and which has everything?’”

She chose The Sequoias and hasn’t regretted it for a minute. Her friends “outside” have reinforced that decision many times by saying she made the best choice. And of course she has made many friends within the community over the last 12 years.

Before her retirement, Kay worked for the Jesuit missionaries for over 20 years as the manager of their office in San Francisco. “On one vacation trip, I was able to visit many of them at their mission sites in Japan and Taiwan to witness their work among the native and indigenous people. It was a joy and an inspiration to work for these selfless men.”

Kay has served cookies and beverages to the residents in the Health Center at The Sequoias each Monday for more than five years. “Sometimes a patient wants to chat with me for a few minutes or perhaps wants something picked up at the store or library.”

“One long-time patient, a widow who had no family and was slowly losing her vision, especially looked forward to my weekly visit. She had many friends but not many visitors.” Of her volunteering, Kay says simply: “It makes me happy.”
SUSAN’S JOURNEY to The Woods began in 1999 when a friend was looking for retirement options. “We were in Little River, a little lost, when suddenly I cried out, ‘This is it! Stop the car.’” Though Susan had never heard of NCPHS’ retirement community and wasn’t looking for herself, she saw rooftops beyond The Lodge, and made a bee-line to The Woods office. Immediately she was “magnetically attracted” to a vacant lot on The Woods map. Within months, Susan’s new home was on the lot, and she had moved from Oakland into The Woods community.

Individuals from all walks of life are attracted to Mendocino County. Soon Susan connected with others concerned about Mendocino residents who are poor and homeless. The Mendocino Presbyterian Church Deacon’s Outreach to the Homeless includes a weekly morning brunch, food pantry and shower program. Susan and many others from The Woods help with this program regularly.

In Fort Bragg, Susan and others established Love in Action, a network of interested parties making possible the Coastal Winter Extreme Weather Shelter now in its fourth year of operation. This collaborative effort includes the City of Fort Bragg, County of Mendocino, Hospitality House, faith communities, and the community at large.

With a background in research and nursing, Susan was tapped to coordinate the January 2011 Homeless Point-in-Time Count that identified more than 600 individuals without adequate shelter. Acutely aware of existing needs, Susan appreciates the opportunity to represent the region on the local board of the Mendocino County Emergency Food & Shelter Program.

“The most satisfying thing about my volunteer work is that I’ve been able to bring people together to encourage communication and cooperation. This leverages the time and money available for the increasing numbers of people in need of compassion, food, and shelter.”
THE CURRENT CHAIR of the NCPHS Board, David Jamison also serves as a Trustee of Senior Services for Northern California. He founded Jamison/McKay Advertising and has been Managing Partner and CEO for more than 30 years.

He and his wife PJ support a number of nonprofits in San Francisco, including the San Francisco SPCA and the Fine Arts Museums, but their favorite is the San Francisco Community Fund, which they founded in 2006.

“The Fund provides a connection between donors and people in urgent need of modest assistance,” says David. “That can be seniors with critical needs, women and children fleeing a violent environment, pets that need medical care, school children that need a meal or special help to learn.” For example, the Fund has provided beds for the formerly homeless who have moved into apartments, a new, larger television for a centenarian whose eyesight is failing, and a much-needed operation for a senior’s beloved pet.

Needs are assessed by a network of trusted social workers positioned throughout San Francisco and passed on to David and PJ for review. “There is no overhead because operating expenses are absorbed by my company.”

One of the most notable features of the San Francisco Community Fund is that their good deeds are done anonymously. The donors, led by the Jamisons, are a small group of 15–20 individuals whose satisfaction comes from seeing the good they do close-up.

Each of the more than 300 cases with which the Fund has been involved is unique, and the impact on seniors’ lives is large.
Joyce Margaroli
THE SEQUOIAS – PORTOLA VALLEY

JOYCE CONSIDERS herself very lucky to have become a part of The Sequoias-Portola Valley family. “I needed to find someplace with no stairs and when I visited a friend at The Sequoias I knew I had found my new home.” She placed her name on the wait list and put her townhouse in Half Moon Bay on the market. She was shocked when it sold so quickly, then worked with Portola Valley Marketing Director Pam Marron to shorten the process—from a 1-2 year wait to only a few months. She moved in 2007 and “loves everything—the community, my friends, and especially my apartment.”

Her final job before retirement was as an Activities Director in an assisted living facility. “I thought I had left that behind but about two years ago I felt drawn to do something for my neighbors.” She was visiting a friend in the Lodge (the assisted living residence) and was asked to stay for dinner. She had already made other plans but said she would come back the following week. She has been having dinner with Lodge residents every Friday night since then. These dinners are equally popular with residents from both independent and assisted living. There are benefits for both groups to overcoming the isolation that can sometimes set in. Dinner at the Lodge was very quiet with little interaction, but the camaraderie with residents from independent living and those in assisted living have livened up the meal times for everyone. The evenings were dubbed “Guess Who’s Coming to Dinner” after the ’60s movie.

“From the beginning, I was supported by Sequoias staff who provided a special table, chose four of the assisted living residents and even served the wine we brought.” As this activity has grown, others have stepped forward to assist Joyce. But, as she says, “I still come every week and thoroughly enjoy the company.”
Mackie Guo
TOWN PARK TOWERS

MACKIE GUO KNEW early on that she wanted to work with seniors. She completed a double major in Nutritional Sciences & Family Studies and Human Development at the University of Arizona. She moved to the Bay Area immediately after graduation and sought out a position working with seniors. NCPHS hired Mackie for the position of Service Coordinator working at Town Park Towers, one of NCPHS’ affordable housing communities. The Service Coordinator works with residents to provide outreach, assessments, and care planning. These services attend to the emotional, physical, financial, recreational, nutritional, and legal needs of residents. She recently celebrated her fifth anniversary with NCPHS and she still loves her job.

In 2010 Mackie became involved with Tzu Chi, a worldwide organization that originated in the remote Hualien area of China and has expanded to all five major continents of the world with chapters and offices in 47 countries. There are now more than 80 offices and facilities in the United States with more than 100,000 volunteers. Tzu Chi is rooted in Buddhist tradition that seeks “to educate the rich to help the poor and inspire the poor to realize their riches.” Though not connected to any religion, Mackie was drawn to serve partly because of her involvement with NCPHS’ spirituality initiative.

Once a week, on her day off, Mackie and other Tzu Chi volunteers meet at LifeHOUSE a skilled nursing facility in San Jose. They provide entertainment such as plays, games, and Karaoke. “Karaoke is their favorite!” says Mackie, “but we try to do something different every week.” Once each month, Mackie joins the Tzu Chi team to deliver a hot meal to those in a homeless shelter. Mackie’s next goal at Tzu Chi is to contribute her time to help provide free dental care to needy people.

As we work to create light for others, we naturally light our own way.

Mary Anne Radmacher
Communities and Contacts

While NCPHS is much more than “bricks and mortar,” our residents expect and deserve clean, well-maintained, and comfortable surroundings. Each of our seven communities and our two office buildings are unique in location and architecture, but what all have in common is a highly dedicated staff that makes sure our buildings are in excellent condition at all times. This page provides a glimpse of our properties plus full contact information.

The Woods
Fran Tucker, Residential Manager
(707) 937-0294 • ftucker@ncphs.org

The Sequoias–Portola Valley
Joan Bosworth, Interim Executive Director
(650) 851-1501 • jbosworth@ncphs.org

The Tamalpais
Jane Diephuis, Executive Director
(415) 461-2300 • jdiephuis@ncphs.org

Western Park Apartments
Cynthia Davis, Director of Housing
(415) 922-5436 • cdavis@ncphs.org
Generosity is giving more than you can and pride is taking less than you need.

Khalil Gibran
NCPHS
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Yumiko Westland
& Linas Stamposzis
John & Leslie Woodward

Patrons’ Club
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Anonymous
Carol Bayley
Connie L. Brandner
Andrea Dapper
Cynthia Davis
GE Foundation
Paul & Elaine Gormsen
John & Marje Hokenstad
Ira Kurtz
Robert Montance
Sunny Noltimoh
O’Reilly & Faina Glass Co., Inc.
Pacific Coast Trane Service
Pallavici Painting
Resource & Design, Inc.
Don & Susan Scribner
Thomas & Hilary Spencer

Century Club
$100 – $499
David B. Abemethy
Adelina Abril
Jane Aikins
Sharam Akhzar
Ericka Aldana
Teresita Andaya
Lilli Antonoff
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Mansoor Nawim

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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 Paul Gormsen at (415) 202-7819 or pgormsen@ncphs.org.
### SUMMARIZED OPERATING RESULTS

in millions

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<th></th>
<th>2011</th>
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<tr>
<td><strong>Revenues</strong></td>
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<td>Resident fees</td>
<td>$49,880</td>
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<td>12,699</td>
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<td>Fees for services and other income</td>
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<td>Investment income including realized and unrealized gains and losses on investments</td>
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#### 2011 Revenues by Source

- Resident Fees 65%
- Fees for Services and Other Income 16%
- SSNC Activity and Support 2%
- Amortization of Entrance Fees 17%

#### 2011 Expenses by Program

- Housing Program 22%
- Food Service 15%
- Other Program Services 18%
- Program Support Expense 8%
- Depreciation 11%
- Other Program Expenses 3%