



# ABHOW

## CELEBRATING CHARITABLE GIVING

COMMUNITY BENEFITS AND  
SOCIAL ACCOUNTABILITY REPORT  
FOR YEAR ENDING DECEMBER 31, 2008

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## EXECUTIVE SUMMARY

*A retirement community provides free flu shots to seniors in the wider area.*

*An employee earns his college degree through the company's educational assistance program.*

*A widow who has outlived her family and her financial resources is able to remain in her community because of the company's benevolent support.*

These examples of charitable care and community service are multiplied every day across the ABHOW system. They are the natural activities of an organization whose mission is “to enhance the independence, well-being, and security of older people through the provision of housing, health care and supportive services.” Since its founding in 1949, ABHOW has defined its work as charitable ministry. And it has pursued its mission not only in its retirement communities but in the wider towns and cities where the company operates.

This charitable ministry is ABHOW's social responsibility as a nonprofit corporation. ABHOW receives a tax exemption from the federal government because it provides charitable services that the government would otherwise have to provide. As such, ABHOW has an obligation to demonstrate its charitable nature and to measure the community benefits that it provides. But the company recognizes that social accountability is simply the right thing to do.

Annually, ABHOW documents its social accountability. Community executive directors and administrators keep records of their charitable care and community service programs, and they submit this information to the corporate compliance officer. In 2008 ABHOW provided benefits to residents, employees and the wider communities in the following areas:

- Participation in Medicare and managed care programs with associated contractual allowances and reductions from published rates;
- Payment for resident services not reimbursed under Medicaid;
- Direct benevolence to residents;
- Research with other organizations, such as universities;
- Professional education, such as training for doctors, nurses and employees;
- Religious and other services for nonresidents;
- Referral, outreach and support group services to nonresidents;
- Subsidized housing/meals (such as Meals on Wheels, for nonresidents);
- Resident and employee volunteer services;
- Use of community facilities by other nonprofit groups or organizations;
- Community-building and leadership services; and
- Community health and supportive services.

In recent years, ABHOW has sought to measure the dollar value of its charitable care and community service in order to show the relationship between benefits the company provides against the tax benefits that ABHOW receives as a result of being a tax-exempt organization.

In 2008 ABHOW provided \$13.8 million of charitable care and community service. Of that total, \$7.6 million was for “pure charity,” which ABHOW defines as “*any direct contribution to care and services to ABHOW residents and employees, and any direct contribution to community-based charities within the boarder community.*” Estimated tax benefits received in 2008 equaled \$4.3 million. So the company’s social accountability activities far exceeded the tax benefits received. Moreover, the pure charity provided represented 176 percent of those tax benefits received. Refer to Charts 3 and 4 (Chart 4 is a comparison of 2007 and 2008 pure charity results).

Most of ABHOW’s charitable care is delivered in four areas. First of all, the company makes adjustments to Medicare and third party managed care contracts when these government and insurance entities do not fully reimburse ABHOW for the published price of services provided to residents. In 2008 Medicare and managed care adjustments totaled \$2.3 million and \$3.3 million, respectively. However, Medicare and Managed Care adjustments were not counted as charitable benefits for purposes of this report.

Second, ABHOW participates in the Medicaid program which does not fully reimburse ABHOW for the cost of services provided to residents. In 2008 Medicaid contractual allowances totaled \$3.4 million.

Third, ABHOW supports private-pay residents by offering discounts from full contractual rates. These discounts include such items as permanent level of care transfer discounts, below market discounts on certain apartments, SurePay program participation credits, Health Center free day credits, and basic medical credits for doctor and hospital Medicare deductibles. In 2008 these subsidized allowances totaled \$1.9 million. Refer to Tables 1, 4 and 5 as well as Chart 1 for specific details of charitable benefits to ABHOW’s residents.

Finally, ABHOW provides outright benevolence to residents who can no longer afford their care. In 2008 benevolent care equaled \$876,172.

ABHOW communities provided charitable services to their broader communities in the following areas: community health and support services

(\$198,384); meeting space for nonprofit organizations (\$121,694); volunteer time, resources and expertise (\$823,984); community-building and leadership services (\$284,808); community benefit operations (\$9,908), subsidized community housing/meals (\$5,000), and other services (\$152,501). Refer to Tables 4 and 5 as well as Chart 2 for specific details of charitable benefits to the broader community.

In addition to subsidized allowances to residents, adjustments to Medicaid services and direct benevolence to residents, ABHOW's pure charity includes free services delivered to residents, such as health screenings, transportation, and food (\$126,800 in 2008), educational assistance for employees (\$82,780 in 2008), and grants to retirement communities (\$66,683 in 2008). In the wider communities where ABHOW operates, pure charity takes the form of volunteer hours donated by staff and residents (valued at \$889,912 in 2008) and direct contributions of cash, food, donated goods and other charitable services to other nonprofit organizations and supportive services for people in need (\$208,142 in 2008). Refer to Tables 6 and 7 and Charts 3 and 4.

ABHOW's commitment to social accountability is integral to its vision to "hold the trust of its constituency by keeping its promises." All of the company's charitable activities spring from a belief in the sacredness of human life and a philosophy which underscores that ABHOW exists for and is responsible to the communities it serves.

The complete report that follows documents ABHOW's charitable ministry for 2008. The supportive charts and tables in the Appendices further illustrate the information contained in the report.

# CELEBRATING CHARITABLE GIVING 2008

## THE REPORT

The report that follows is a detailed description and estimated value of all charitable contributions given in 2008 by ABHOW, its continuing care retirement communities and its affordable housing retirement communities.

### Services and Activities Occurring for the Benefit of Residents

#### **Resident Discounts from Fully Established Contractual Rates**

- Resident subsidies by ABHOW (continuing care resident contracts and other discounts) during fiscal year 2007-08 were \$1,923,954. Included are non-contract allowances, administrative discounts, permanent transfers to different levels of care credit, below market discounts, health center free days credit, life care contract discounts and medical insurance subsidies. The breakdown by community is
  - Grand Lake Gardens - \$1,276
  - Judson Park - \$162,628
  - Piedmont Gardens - \$137,632
  - Pilgrim Haven - \$65,724
  - Plymouth Village - \$91,994
  - Rosewood - \$66,310
  - San Joaquin Gardens - \$69,989
  - The Terraces of Los Gatos - \$300,860
  - The Terraces of Phoenix - \$691,813
  - Valle Verde - \$335,728

#### **Direct Benevolence to Residents**

- Direct benevolence to continuing care residents by ABHOW during fiscal year 2007-08 was \$876,172. The breakdown by community is:
  - Piedmont Gardens - \$20,861
  - Pilgrim Haven - \$89,214
  - Plymouth Village - \$105,610
  - Rosewood - \$57,402
  - San Joaquin Gardens - \$280,153
  - The Terraces of Los Gatos - \$88,612
  - The Terraces of Phoenix - \$44,301
  - Valle Verde - \$190,019

### **Payment for Items Not Reimbursed by Medicaid Contracts**

- Adjustments of \$3,399,676 were made to ABHOW residents during fiscal year 2007-08 representing Medicaid contracts that did not pay the full amount for their care.
- The breakdown of these adjustments to residents is listed below by community:
  - Judson Park - \$1,520,756
  - Piedmont Gardens - \$393,440
  - Pilgrim Haven - \$58,129
  - Plymouth Village - \$66,835
  - Rosewood - \$713,425
  - San Joaquin Gardens - \$277,542
  - The Terraces of Los Gatos - \$102,085
  - The Terraces of Phoenix - \$22,274
  - Valle Verde - \$245,190

### **Subsidized Allowances to Residents – Adjustments to Medicare and other Managed Care Services**

Adjustments made by ABHOW for Medicare were \$2,304,683 and for other managed care services to residents were \$3,267,243 for a total of \$5,571,926 for 2007-08. These adjustment amounts were not counted in the report as charitable benefits.

### **Charitable Contributions to ABHOW Residents and Employees**

- During 2008, the ABHOW Foundation awarded grants and made contributions as follows:
  - To Allen Temple Gardens for an upgrade to the emergency pull cord system and lobby furniture - \$11,900
  - To Allen Temple Arms for new lobby furniture, television and lawn and patio furniture - \$7,000
  - To Allen Temple Manor residents for a television - \$3,200
  - To Tahoe Senior Plaza for a television, Wii system, portable green house, and a fish aquarium - \$5,750
  - To E. E. Cleveland Manor for outdoor benches - \$2,600
  - To Broadmoor Plaza for beauty salon equipment, exercise equipment and outdoor area furniture - \$4,000
  - To Harbor View Manor for clean air machines - \$3,200
  - To Judson Terrace for an automatic door - \$4,000

- To Hillcrest Gardens for security cameras - \$15,333
- To Casa de la Vista for patio furniture - \$1,800
- To Fern Lodge for two new computers - \$2,000
- To Mt. Rubidoux Manor for patio furniture - \$5,000
- From the Lucile Ice Endowment for Music Fund to Grand Lake Gardens to subsidize a classical piano concern for residents - \$200
- From the Lucile Ice Endowment for Music Fund to Terraces of Los Gatos for the Holiday Festival Concert - \$200
- The Social Responsibility Fund made a grant to the Riverside Art Council for the Plymouth Village grove Art Program - \$2,500
- A donation was made to the Gordie Foundation from the Social Responsibility Fund - \$2,000
- A grant was made to the Senior Helpline Services for safety equipment from the Social Responsibility Fund - \$3,000
- The Association of Fundraising Professionals was given a donation from the Social Responsibility Fund - \$500
- ABHOW loaned \$600,000 for acquisition of Tahoe II advancing the funds without interest - \$36,000

### **Research and Educational Activities with Other Organizations**

- Casa de la Vista facilitated research conducted by Psychology students from California State University - \$500
- Judson Terrace Homes was a training site for nutritional students from California State Polytechnic University – \$7,776
- The Nursing Program of Riverside Community College partnered with Mount Rubidoux Manor to study Range in Motion processes among the elderly - \$10,125
- Mount Rubidoux Manor is a field laboratory for LaSierra University's Service Learning Project for graduate students to learn about aging - \$8,505
- Piedmont Gardens was a geriatric training site for the Joint Medical Program at the University of California, Berkeley - \$12,500
- Rosewood was a training site for CNAs, LVNs and Home Health students in clinical studies and offered Chaplain mentors for theology students - \$12,000

- Fourteen Arizona State University nursing students received training at The Terraces of Phoenix Health Center - \$6,500
- The Medical Director of The Terraces of Phoenix utilized the Health Center for geriatric training rotation for residents/interns - \$3,086
- Valle Verde researched with University of California Santa Barbara on a Memory and Parkinson project - \$2,500
- Valle Verde continued on-going work with Posit Science in both Auditory and Visual input - \$9,600
- Santa Barbara City College worked with Valle Verde as a host site for CAN and LVN training - \$5,000
- Activity professionals received state certification through a program hosted at Valle Verde - \$1,000

### **Other Community Benefits to ABHOW Residents and Employees**

- Through ABHOW's educational assistance program, the organization made grants to employees to subsidize their educational pursuits - \$29,800
- Prayer service and Bible Study programs were held for residents and the broader community by Allen Temple Arms - \$2,000
- Allen Temple Arms offered Ecumenical church services at their retirement community for residents and the Oakland community - \$2,600
- Alameda County Para Transit provided transportation services for Allen Temple Manor and Allen Temple Gardens residents - \$10,000
- Under the Brown Bag food program, groceries were donated to residents of Allen Temple Manor and Allen Temple Gardens - \$3,000
- Monthly worship services were provided by the Allen Temple Baptist Church for residents of Allen Temple Manor and Allen Temple Gardens - \$1,200
- Allen Temple Baptist Church provided Bible Study to Allen Temple Manor and Allen Temple Gardens residents - \$1,200
- The local Rotary Clubs provided pancake breakfasts, dinners and gifts to Casa de Redwood residents - \$2,500
- The Senior Companion Program provided transportation and assistance to frail residents of Casa de Redwood - \$5,000
- The Mercy Brown Bag program donated food to residents of E. Cleveland - \$3,000

- The City of Oakland Department on Aging provided a grocery shuttle for E. E. Cleveland residents - \$3,000
- Food was donated to E. E. Cleveland residents by the Center of Hope Community Church in Oakland - \$3,000
- Spiritual services were held each week for Grand Lake Gardens residents, staff, family members and friends - \$12,000
- Different churches in the Tacoma area provided weekly Vesper services for residents of Harbor View Manor and the public - \$2,000
- The Greater Tacoma Miller Foundation donated funds to construct a computer center and Comcast donated Internet access for residents of Harbor View Manor - \$5,000
- A scholarship grant from the Judson Park Resident Scholarship Committee supported employees seeking higher education - \$1,000
- Emergency financial assistance supported employees of Judson Park who experienced difficult times - \$1,780
- A Holiday Food Drive was held by Judson Park to provide nutritional support for employees and family members in need - \$2,200
- Mount Rubidoux Manor donated in-kind programs and services to residents such as activities, luncheons, food commodities and assistance with HEAP (Home Energy Assistance Program) applications - \$2,400
- The First Baptist Church sponsored special luncheons and parties for Mount Rubidoux Manor residents – \$600
- Flu shots were given to Mount Rubidoux Manor residents by ABHOW – \$750
- The Riverside First Baptist Church sponsored a 12-week seminar “GriefShare” for Mount Rubidoux Manor residents - \$250
- Mount Rubidoux Manor residents benefited from computer instruction provided by LaSierra University students - \$600
- Pacific Meadows residents were provided special activities and programs such as complimentary taxi service to shopping and a variety of educational sessions on topics of aging - \$1,200
- Residents of Pacific Meadows were provided activities and programs on travel, exercise, dance, field trips, and “Time to Talk” resident discussion groups - \$1,200
- An emergency preparedness training session was provided to residents of Pacific Meadows by the Red Cross - \$500

- A drivers safety and certification program was presented by AARP for residents of Pacific Meadows - \$200
- Counseling by an attorney provided on site legal services for residents of Pacific Meadows and seniors residing in Pacific Grove - \$600
- Pilgrim Haven provided educational benefits to full time licensed nurses to pursue areas of their specific interest - \$1,000
- One-on-one and classroom computer training were provided to front line employees by Pilgrim Haven - \$7,000
- Pilgrim Haven provided weekly continuing education classes for nurses and monthly classes for all employees on a variety of subjects - \$20,000
- Rosewood residents contributed time and resources to knit blankets for Health Center residents and to make bouquets for residents - \$17,900
- An employee educational assistance fund was funded by Rosewood residents to support employees educational pursuits - \$1,000
- The Terraces of Los Gatos provided a Notions and Needs Store for the benefit of residents and visitors from the broader community - \$24,900
- Residents of The Terraces of Phoenix implemented a scholarship fund to support employees in need - \$1,500
- Weekly visits to residents of Tahoe Senior Plaza were made by representatives from El Dorado Services for the Blind and Hard of Hearing - \$2,000
- Regular and special religious services supporting several faith traditions were provided at Valle Verde for residents of the Grove and Health Center - \$2,000
- Family days and dinners for residents with family members living in the Valle Verde Grove and Health Center - \$2,000
- College scholarships were provided to Valle Verde employees and their children - \$44,000

### **Charitable Ministry Benefits Provided for the Broader Community**

#### **Community Health and Supportive Services**

- Allen Temple Arms provided Podiatrist treatments and services to residents and seniors in the Oakland community - \$4,500

- Fit and Strong exercise programs were provided to Allen Temple Manor and Allen Temple Gardens residents and the community by the Arthritis Foundation - \$5,000
- On a weekly basis, the Alameda County Food Bank donated dry goods for Allen Temple Manor and Allen Temple Gardens residents - \$10,000
- Bellflower Friendship Manor provided community service time for teenagers to complete requirements for court appointed offenses or school projects - \$2,080
- Casa de la Vista facilitated community service requirements for students of Redlands East Valley High School - \$101
- Through the Second Harvest Brown Bag program, food was provided to residents of Casa de Redwood and the broader community - \$3,000
- Lifelong medical care was provided through nurse visits to E. E. Cleveland residents and Oakland area seniors - \$5,000
- Pregnancy aid supplies (crib quilts and knit hats) were donated to low-income mothers of new born children by Judson Park - \$14,175
- Judson Park staff were mentors at Pacific Middle School for “at risk” children - \$1,457
- A holiday support group was provided for residents, staff and the public by Judson Park - \$304
- Underprivileged children with disabilities were taken on a boat ride by staff of Judson Park - \$81
- Toys were donated by Judson Park staff to the Seattle Police Department for “at risk” children - \$181
- Staff of Judson Park volunteered to provide enrichment for Fife School students in the classroom and other programs - \$1,013
- Judson Park donated to a fundraiser for the Resident Councils of Washington to support education of residents and staff in care giving settings - \$600
- As a member of the Elder Adult Day Health Service, Judson Park staff volunteered and made donations to elders attending day health programs throughout King County - \$243
- Judson Park donated to the Des Moines area Food Bank - \$1,200
- Judson Terrace Homes provided health screening for seniors in the San Luis Obispo community - \$300

- For those living in a homeless shelter in San Luis Obispo, Judson Terrace Homes provided monthly meals - \$755
- Counseling and referral services for seniors in San Luis Obispo County were provided by Judson Terrace Homes - \$1,200
- Manila Terrace with TWNDC Community Outreach distributed food monthly to the food bank for Filipino Town residents - \$1,975
- Santa Maria Senior Center used Oak Knolls Haven as a distribution center for the grocery bag food program benefiting residents and the broader Santa Maria community - \$1,200
- Oak Knolls Haven worked with non-profit groups such as Community Partners in Caring to identify seniors in Santa Maria who need transportation and light housekeeping - \$1,500
- Pacific Meadows provided health screenings, flu shots, and blood pressure clinics to residents and the public - \$4,500
- Food bank monthly commodities and a Farmers Market were provided to Pacific Meadows residents and the broader community Pacific Grove community - \$3,000
- Piedmont Gardens donated coats for the One Warm Coat Drive for the needy in Oakland - \$800
- The Piedmont Gardens' Saturday Senior Center donated handmade hats, blankets, dolls, scarves, pillows and tray favors to local hospital patients - \$52,650
- Piedmont Gardens collected food for the Alameda County Food drive - \$3,600
- Pilgrim Haven held an annual Health Faire and three health education seminars for residents and the Los Altos community - \$4,000
- Plymouth Village provided space, labor and arms to support five blood drives - \$5,000
- For Redlands community caregiver support groups, Plymouth Village facilitated meetings, provided space, and staff support - \$2,000
- Staff of Plymouth Village supported the regional occupational program participants - \$708
- Home care open houses were hosted by Plymouth Village which provided timely information and support to the Redlands broader community - \$2,000
- Rosewood sponsored and hosted the Kern County Senior Olympics where seniors in the County interacted with high

- school students, cheerleaders and local city officials by competing in games, a parade and receiving medals - \$1,700
- San Joaquin Gardens offered educational activities for professionals in the Fresno and Clovis communities in areas such as Wound Care, Dietary Directions, and Chef Center Stage - \$2,800
  - “Best Friends Approach” was presented by San Joaquin Gardens to provide information to the greater Fresno Community on caring for individuals with memory loss - \$750
  - San Joaquin Gardens participated in and made donations for fund raising and advocacy events benefiting local community organizations such as Senior Living Network, The Aging Network, A/P Women, Women’s Foundation of California - \$1,000
  - Offerings were given by San Joaquin Gardens residents in support of Love, Inc, an organization that provides emergency food, utilities, household repairs, and transportation support - \$1,316
  - San Joaquin Gardens residents gave offerings to Marjorie Mason Center, a temporary shelter for women and children providing anger management and educational assistance - \$2,392
  - The Maroa Home was the beneficiary of offerings from San Joaquin Gardens’ residents. The Home is a residential men’s rehabilitation home, offering job training, financial management, education, alcohol and drug addiction rehabilitation - \$1,878
  - Nancy Hinds Hospice providing end-of-life care, counseling, support and training received offerings from residents of San Joaquin Gardens - \$1,243
  - Providing warm meals, overnight housing for men, drug & alcohol rehabilitation and services for homeless individuals, the Poverello House was the recipient of offerings from San Joaquin Gardens - \$1,189
  - The Stone Soup Community Center offers after school programs in literacy, job counseling, cultural awareness and other activities received offerings from San Joaquin Gardens residents - \$1,496
  - The Fight Hunger Drives of the Community Food Bank received cash gifts and nonperishable foods from San Joaquin Gardens’ residents and staff - \$1,500

- San Joaquin Gardens staff and family members donated cash and time participating in the “race for the Cure” for breast cancer - \$1,150
- On Super Bowl Sunday, San Joaquin Gardens’ residents participated in “Souper Bowl” where they vote with cash for the team they wish to win by putting money in a large soup kettle labeled with the team logo. All money received goes to the Community Food Bank to help feed the poor in the greater Fresno area - \$1,062
- For the Chowchilla Prison Christmas, residents and staff of San Joaquin Gardens donated items to be used by the Center for Non-Violence to be given to prisoners - \$780
- San Joaquin Gardens residents and staff donated to Wheels for the World, a community-based ministry of Joni and Friends, equipment such as used wheelchairs, walkers, crutches and canes to be refurbished and shipped to Rumania for distribution to those in need - \$5,000
- Residents of Tahoe Senior Plaza and seniors of the South Lake Tahoe community benefited from commodities dropped off at the community - \$250
- Annual flu shots were provided for residents of Tahoe Senior Plaza and the community at large - \$55
- The Terraces of Los Gatos provided outreach to the community by supporting Toys for Tots, Disaster Assistance (CERT), and the Second Harvest Food Bank - \$9,200
- Support groups were held on topics such as the loss of a spouse, managing life changes, improving communications, and vision support for residents and the broader community - \$1,650
- The Terraces of Los Gatos provided referral and outreach services to those residing in the broader Los Gatos community - \$3,000
- The Foundation for Senior Living held a seminar at The Terraces of Phoenix hosting 120 social workers from the broader community - \$750
- Residents of The Terraces of Phoenix made lap blankets that were provided to Children’s Crisis Center Shelter - \$600
- The Terraces of Phoenix Christmas Angel Tree provided fifty toys that were purchased, wrapped and delivered along with clothing to families that would not receive gifts due to incarceration, substance abuse or neglect - \$1,800

- On a weekly basis, residents from The Terraces of Phoenix made sandwiches, delivered clothing and individual care packages to homeless teens in the Phoenix area - \$4,500
- Valle Verde made referrals for family and friends when needed for support - \$500
- Valle Verde provided support groups for non-residents including bereavement groups through Visiting Nurses - \$1,200
- Year round efforts of residents of Valle Verde produced wooden toys to the Santa Barbara Unity Shoppe, which provided holiday gifts for underprivileged families and seniors in nursing homes - \$5,000
- Valle Verde residents provided hand sewn, knot and a variety of clothing and items for young children and babies which was donated to the Unity Shoppe - \$5,000

#### **Subsidized Housing or Meals to the Broader Community**

- A subsidy was made to a non-resident who did not have means to pay for housing at Grand Lake Gardens - \$5,000
- As a community service, Valle Verde provided Meals on Wheels and local Hospice meals for those in need

#### **Use of the Retirement Community Facility**

- Bellflower Friendship Manor hosted a fund raiser for a non-profit children's organization - \$400
- Interviews for candidates of the Miss Bellflower Beauty Pageant were conducted at Bellflower Friendship Manor - \$200
- Space was provided at Bellflower Friendship Manor for TOPS (Taking Off Pounds Sensibly), a non-profit organization to hold weekly meetings - \$520
- Exercise/conditioning classes were provided at Casa de la Vista for residents and the public in coordination with the Redlands Adult School - \$2,600
- Casa de Redwood provided facility space to the San Mateo County Commission on Aging to hold public meetings - \$1,200
- E. E. Cleveland provided space for the Over Sixty Clinic to hold their organizational meetings - \$1,200
- Grand Lake Gardens provided meeting space for a local church - \$5,500
- An Oakland non-profit organization conducted a fund-raising seminar at Grand Lake Gardens - \$1,000

- A local Anonymous Debtors group was provided space at Grand Lake Gardens for their meetings - \$2,500
- Quarterly meetings of the California Department of Social Services were held at Grand Lake Gardens - \$1,000
- Grand Lake Gardens provided facility space for the Golden Gate chapter of Aging Services of California to hold their monthly meetings - \$1,500
- Harbor View Manor offered space for the Red Cross to meet where members made over 40,000 quilts for fire victims in the Tacoma community - \$4,000
- The City of Tacoma Fire Department partnered with Harbor View Manor for space to conduct on-going High Rise Building Training which was done in conjunction with the retirement community's fire drill - \$1,000
- The Korean Women's Association held weekly Bible Study meetings at Harbor View Manor - \$1,200
- Aging Services of Washington were provided space at Judson Park to hold community meetings - \$2,520
- Judson Park provided facility meeting space for Highline Community College nursing students - \$11,122
- Judson Terrace Homes provided space for monthly EOC Senior Health Screening programs - \$1,929
- The social hall at Manila Terrace was used for meetings of the TWNDC Community Outreach programs - \$300
- Meetings were held at Manila Terrace for People's CORE projects on community health, education and advocacy - \$1,200
- Manila Terrace donated facility space to be used as a polling site during elections - \$1,600
- Mount Rubidoux Manor provided meeting space for community awareness and neighborhood watch meetings - \$1,944
- Several non-profit organizations in the Pacific Grove area met at Pacific Meadows (The Alliance on Aging, H.E.A.P., Carmel Foundation, Episcopal Senior Communities, and the Red Cross) - \$4,800
- Meeting space was provided by Piedmont Gardens for East Bay moms CPR training sessions - \$800
- Piedmont Gardens provided space for the East Bay Mediation organization for workshops and classes - \$400
- Rehearsal space was provided at Piedmont Gardens for Variety Pack Chorus and Women's Will Shakespeare Company - \$7,000

- Piedmont Gardens provided meeting space for Overeaters Anonymous, Debtors Anonymous and Business Debtors Anonymous - \$8,400
- Meeting space was provided for a community quilting group, voting site, church services and adult education classes available to residents of Pilgrim Haven and the Los Altos community - \$6,500
- Meeting space and resources were provided by Plymouth Village for the Boy Scouts of America - \$3,400
- Plymouth Village provided regular meeting space and staff support to Redlands Horticultural Society - \$2,000
- Rosewood provided facility meeting space for community organizations such as Alcoholics Anonymous, 60+ Club, Golden Kiwanis, Golden Empire Chorus, elections, adult education, etc. - \$9,600
- San Joaquin Gardens was a polling place for Fresno area residents - \$1,600
- Tahoe Senior Plaza hosted a community event where a local author shared his writings with residents and the South Lake Tahoe community - \$200
- Representatives from Cal-Star visited and provided an educational session for residents of Tahoe Senior Plaza and the broader South Lake Tahoe community - \$75
- The Terraces of Los Gatos provided meeting space for non-profit organizations in the broader community - \$7,600
- “Terraces Goes Green” was hosted by The Terraces of Phoenix that included outside vendors - \$1,000
- The North Hills Church of God met for a Leadership Seminar at The Terraces of Phoenix - \$250
- The Terraces of Phoenix provided meeting space for the ABE board, local homeowners, National Charity League, and Hadassah Valley of the Sun - \$850
- The League of Women Voters and the Active Aging Week were provided meeting space at The Terraces of Phoenix - \$2,800
- The Terraces of Phoenix was a polling place for state and national elections - \$1,600
- The Gathering Place at The Terraces of Phoenix was provided for church and vesper services, health presentations, Art All Around Us, and a Children’s Piano Recital - \$4,524

- The Terraces of Phoenix provided the Monaco Lounge for the All Star Kids Tutoring program and the Phoenix Country Cub Bridge - \$2,392
- The Low Vision Support group met in The Terraces of Phoenix Technology Center - \$868
- Meeting space was provided by Valle Verde for many non-profit organizations such as Visiting Nurses, Hospice, Alzheimer's Association, Center for Innovative Therapies, Accordion International Music Society, National Charity League, various church organizations, PEO, Alternative for Violence, neighboring Home Owners' Associations, Retired Physicians of Santa Barbara, and several university alumni groups - \$2,000
- Valle Verde hosted close to 50 programs through the community's Special Events Committee for members of the community to speak to residents and the community on a variety of subjects or an opportunity for entertainment - \$5,000
- Learning opportunities were given for Valle Verde residents and seniors from the Santa Barbara community such as Vistas for Life-long learning for Seniors, Santa Barbara City College adult education classes, Santa Barbara Symphony in providing classes for residents and the Santa Barbara community - \$2,000
- Valle Verde hosted political forums for local candidates and the voting district - \$1,600

### **Community Building and Leadership Activities**

- ABHOW made donations to Aging Services of California, a non-profit state association - \$18,333
- Contributions were made to American Association of Homes for the Aging, a national non-profit organization - \$36,667
- Individuals served on boards and corporate membership for ABHOW in 2008 as follows:
  - ABHOW Board of Directors volunteered 1,020 hours – \$20,655
  - Cornerstone Affiliates (ABHOW's parent organization) Board of Directors volunteered 555 hours - \$11,269
  - ABHOW Corporate Members volunteered 225 hours - \$4,556
  - The ABHOW Foundation board members volunteered 248 hours - \$5,022

- Local continuing care retirement community board members volunteered 2740 hours – \$55,485
  - Local affordable housing retirement community board members volunteered 3840 hours - \$77,760
- Staff of Judson Park spoke at meetings and conferences of Aging Services of Washington, Aging Services of California and the American Association of Homes and Services for the Aging – \$6,338
- Judson Park staff advised seniors in the Des Moines and Normandy Park areas through efforts of the City of Des Moines Senior Services Advisory Committee - \$405
- As a member of the City of Des Moines Parks and Recreation Citizen Advisory Committee for Master Plan, Judson Park staff offered advice on issues related to seniors - \$810
- Residents of Judson Park donated to support programs of the Des Moines Police Department and the South King County Fire and Rescue Department- \$1,250
- Staff of Judson Park volunteered and donated resources for the Des Moines Legacy Foundation Bayside Brunch - \$1,081
- Judson Park staff was a board member of Des Moines Rotary - \$3,038
- Staff of Judson Park led meetings of the Camp Fire USA - \$304
- Residents of Mount Rubidoux Manor embraced the City of Riverside’s GAP (Green Action Plan) and formed an advocacy group for seniors in the broader community to “Give the Gift of Green” to sustain the environment - \$4,961
- Mount Rubidoux Manor participated in a neighborhood clean-up program for the City of Riverside “Keep Riverside Clean and Beautiful” - \$3,159
- Pacific Meadows provided space and staff support for trainings in affordable housing maintenance for other housing property managers - \$3,200
- Plymouth Village staff served as a member of the Redlands Senior Housing Board of Directors and the Chamber of Commerce - \$750
- Staff of Plymouth Village participated in activities for the Inland Empire Alzheimer Association including hosting and contributing to local walk and fundraising efforts - \$7,000
- As a volunteer, Plymouth Village staff donated time and resources to IACC facilitating events and providing information for Redlands seniors - \$1,000

- Plymouth Village staff participated in mock interviews for the San Bernardino County Schools Compact Program providing networking opportunities and career guidance for students - \$2,000
- As a board member of the University of Redlands Alumni Association, Plymouth Village staff provided advice, leadership and linkages between alumni, students and the broader community - \$2,000
- Staff of Plymouth Village participated in ALFIE for Assisted Living to network and promote awareness of services for seniors and families in need of support - \$365
- The Terraces of Los Gatos staff was a presenter at state and national aging organizations - \$2,000
- Residents and staff of The Terraces of Los Gatos provided assistance in an elementary school volunteer exchange program and in English as a Second Language for staff immigrants - \$1,700
- Ten children from local area schools were partnered with ten residents from The Terraces of Phoenix who provided individual “All Star Tutoring” for elementary school children from families of incarcerated parents - \$5,500
- Staff of Valle Verde were sponsored in active participation in Rotary International - \$5,000
- Valle Verde staff participated on an advisory board of the University of California Santa Barbara’s Osher Lifelong Learning Institute - \$1,200
- Participation of time, resources, meeting space and expertise were provided by Valle Verde staff on the board of the Center for Innovative Therapy - \$1,000
- Walking trails and open and park spaces at Valle Verde were provided for the benefit of the broader community - \$1,000

### **Community Benefit Operations Activities**

- Dedicated management staff costs to coordinate the ABHOW community benefit operations and social accountability program - \$5,000
- Other costs associated with the ABHOW social accountability and community benefit analysis and report – \$4,908

### **Other Benefits to the Broader Community**

- Volunteer Services to Community Organizations by Residents and Staff of ABHOW and its Retirement Communities:

- During 2008, the local retirement communities' executive directors and administrators and executives and staff of the home office donated 2,374 hours of volunteer services to local, state and national aging services organizations - \$48,074
- Staff of Casa de la Vista volunteered for the Run through Redlands, a community marathon to raise funds for the Redlands community, by serving water and refreshments for runners and the public - \$122
- Staff of Harbor View Manor volunteered as a board member with the Tacoma Affordable Housing Consortium - \$2,000
- Harbor View Manor staff volunteered as a member of the Board of Affordable Housing Management Association Northwest - \$3,000
- Judson Park staff volunteered time, resources and services to the Washington Baptist Convention, Panther Lake Community Church, St. Francis Church, Church of the Good Shepard, Des Moines Methodist Church, University Presbyterian Church, and Lake Burien Presbyterian Church - \$7,837
- Judson Park staff volunteered to assist patients of Highline Community Hospital through membership on the Highline Hospital Patient Advisory Council - \$208
- Residents of Judson Park were Christmas tree lighting volunteers for the City of Des Moines - \$162
- Judson Park staff assisted in classroom and at PTA events for students at Highline's Shorewood Elementary School - \$648
- Staff of Mount Rubidoux Manor was a member of the Dales Senior Center Advisory Board - \$12,636
- Pacific Meadows staff volunteered time and resources serving on the Area Agency on Aging, American Red Cross, Shoreline Community Church, and the Pacific Grove Peninsula Community Church - \$10,978
- Plymouth Village staff volunteered at local church for the senior services group and church shut-ins - \$972
- Residents and staff of Rosewood volunteered in churches, Institutional Research Review, Braille Institute, Library and other senior advocacy and service organizations in the Bakersfield community - \$3,200

- Residents and staff of San Joaquin Gardens donated cash, commodities and volunteered time during the Fight Hunger Drives of the Community Food Bank in Fresno - \$709
- Tahoe Senior Plaza residents donated time and resources to the Barton Hospital and the El Dorado Cancer League - \$6,613
- Residents of The Terraces of Los Gatos provided assistance and services to Assisted Living and Health Center residents - \$26,300
- The Terraces of Los Gatos residents volunteered time and resources on the Resident Council - \$47,200
- The Terraces of Phoenix staff volunteered at the local Humane Society and churches - \$700
- Valle Verde participated in and provided resources for the South Coast Alzheimer's Association Memory walk for Alzheimer's and other dementias - \$750
- On-going opportunities were provided by Valle Verde for other organizations such as National Charity League and local schools and other organizations to volunteer at the retirement community - \$700
- Valle Verde residents volunteered outreach in the Santa Barbara community in areas such as government agencies, environmental groups, garden organizations, Hospice, health agencies, educational programs, museums recoding for the blind, Braille, religious organizations, service clubs and shelter services - \$123,525
- Internal volunteer service by Valle Verde residents was recorded for the retirement community - \$324,000
- Residents of Valle Verde volunteered many hours in the Assisted Living and Grove programs - \$101,250
- Individuals from the Santa Barbara community volunteered in the Assisted Living and Health Center - \$100,000
- Valle Verde staff volunteered outreach service to local service organizations such as service clubs, Santa Barbara and Goleta Chambers of Commerce, and church organizations - \$2,400

- Other Services to Community Organizations by Residents and Staff of ABHOW and its Retirement Communities:
  - Bellflower Friendship Manor hosted the Bellflower Adult School programs five times a week for classes - \$4,500
  - English as a Second Language was coordinated and offered by a resident of Broadmoor Plaza for residents and the broader community - \$1,500
  - Coordinated and arranged by a resident of Broadmoor Plaza, exercise classes were provided for residents and the broader community - \$2,000
  - Casa de la Vista donated newspapers to the Redlands High School Band to assist in band expenses - \$486
  - Partnered with the Salvation Army Angel Tree Program, Casa de la Vista provided gifts for needy children in Redlands - \$301
  - Through the Better Living for Seniors organization, Casa de Redwood residents and the broader community were able to attend activities and events - \$5,000
  - Residents of Harbor View Manor assisted the Red Cross by donating time and materials to make quilts for Tacoma fire victims - \$1,200
  - Harbor View Manor sponsors programs and activities for McCarver Elementary School students who are financially challenged - \$1,000
  - Staff of Harbor View Manor provided referrals, case management, and educational and wellness classes to assist residents and the public with needed resources and services - \$8,000
  - A free exercise class was held twice a week for residents of the historic Filipino Town, Los Angeles by Manila Terrace in collaboration with TWNDC Community Outreach - \$3,209
  - Manila Terrace provided complimentary classes on Christmas lantern making in collaboration with TWNDC Community Outreach to benefit residents of historic Filipino Town, Los Angeles - \$600
  - Non-denominational weekly Bible Study and Catholic Rosary services were conducted at Mount Rubidoux

- Manor for residents and the boarder Riverside community - \$2,106
- Mount Rubidoux Manor provided educational seminars on wellness and vulnerability to residents and the public - \$972
  - Community service classes on creative arts and exercise were provided to residents of Oak Knolls Haven - \$1,200
  - The local Orchid and Gardening Club provided orchid and general gardening classes for Oak Knolls Haven residents - \$600
  - Piedmont Gardens donated towels, pillows, and heating pads to the Society for the Prevention of Cruelty to Animals - \$500
  - Residents of Pilgrim Haven volunteered to work on the newsletter and to assist in the Health Center and Assisted Living - \$8,450
  - Plymouth Village sponsored and was the host site for the annual Senior Olympic games for Redlands - \$5,000
  - Plymouth Village paid leave to support employee jury duty - \$5,027
  - San Joaquin Gardens' residents collected recyclable computer ink cartridges as donations to the Robinson Elementary School Computer Program in Fresno - \$50
  - Residents, friends, family and the broader South Lake Tahoe community were provided weekly Bible Study at Tahoe Senior Plaza - \$100
  - A Celebration of Holidays was held at Tahoe Senior Plaza for residents, families, board members, community leaders and friends - \$1,200
  - A bake sale fundraiser by Valle Verde residents was given for local City College scholarships for employees and families - \$2,500
  - The on-campus all-volunteer thrift shop at Valle Verde provided low-cost items for residents and the community - \$72,000
  - Residents from another retirement community in the area utilized the Valle Verde swimming pool for therapy classes while their pool was being repaired - \$25,000

## Appendices

The following Tables and Charts further illustrate ABHOW's benevolence to the community of residents and employees and our commitment to the broader community in which each resides - the charitable ministry of American Baptist Homes of the West.

**Table 1**  
Charitable Ministry Benefits to ABHOW Residents  
Subsidized Allowances, ABHOW Direct Benevolence,  
and Third Party Adjustments to Residents  
Fiscal Year 2007-08

Resident	Discounts from Fully Established Contractual Rates*	ABHOW Direct Benevolence to Residents**	Medicaid Contractual Adjustments***	Total
Grand Lake Gardens	\$1,276	\$0	\$0	\$1,276
Judson Park	\$162,628	\$0	\$1,520,756	\$1,683,384
Piedmont Gardens	\$137,632	\$20,861	\$393,440	\$551,933
Pilgrim Haven	\$65,724	\$89,214	\$58,129	\$213,067
Plymouth Village	\$91,994	\$105,610	\$66,835	\$264,439
Rosewood	\$66,310	\$57,402	\$713,425	\$837,137
San Joaquin Gardens	\$69,989	\$280,153	\$277,542	\$627,684
The Terraces of Los Gatos	\$300,860	\$88,612	\$102,085	\$491,557
The Terraces of Phoenix	\$691,813	\$44,301	\$22,274	\$758,388
Valle Verde	\$335,728	\$190,019	\$245,190	\$770,937
	\$1,923,954	\$876,172	\$3,399,676	\$6,199,802

\* = Column 1 represents miscellaneous discounts provided to private paying residents and includes such items as permanent level of care transfer discounts, SurePay program participation credits, Health Center free day credits, basic medical credits for doctor and hospital Medicare deductibles and other miscellaneous administrative discounts.

\*\* = Column 2 represents benevolent discounts given to residents whose means are insufficient to cover the entire monthly fee and charges for other services.

\*\*\* = Column 3 represents contractually obligated discounts to Medicaid (MediCal) insurers who do not pay the full amount of our published prices (according to the terms of our agreement with them). Adjustments of \$2,304,682 for Medicare and \$3,267,243 for Managed Care are not included.

**Table 2**  
Number of Recorded Community Benefits  
by Continuing Care Retirement Community  
2008

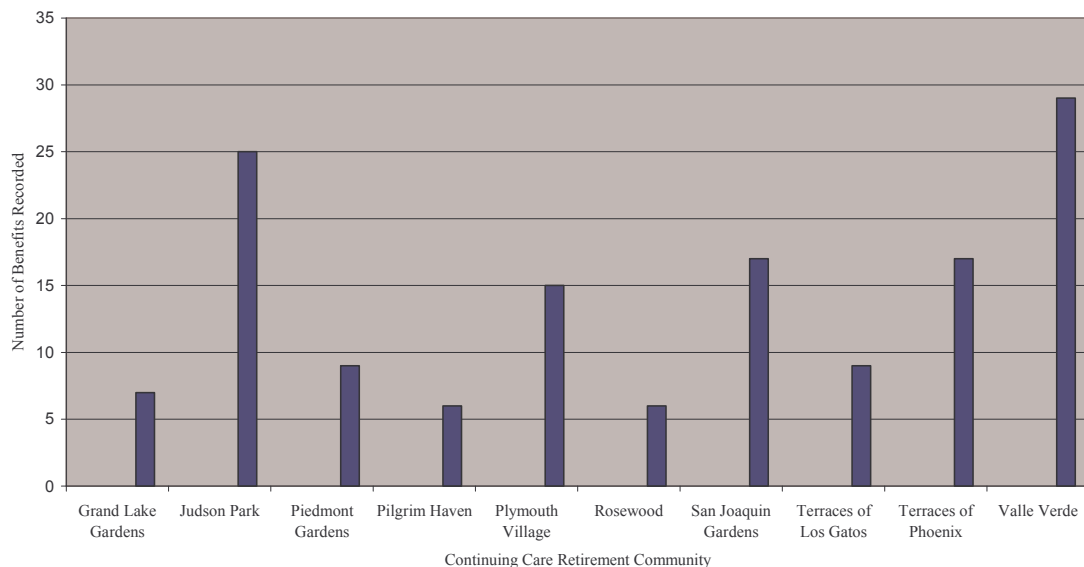


Table 3  
 Number of Recorded Community Benefits  
 by Affordable Housing Retirement Community  
 2008

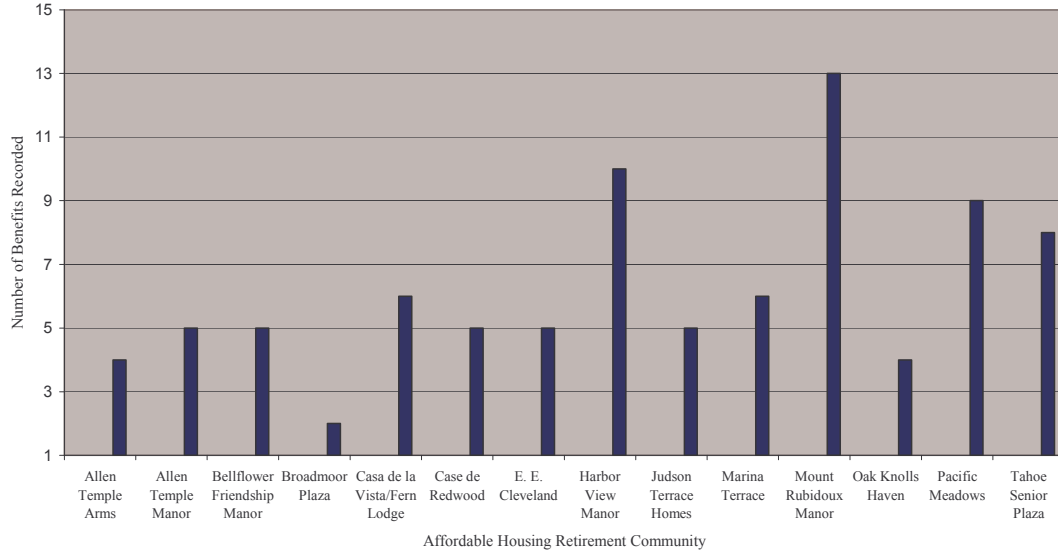


Table 4  
 Recorded Value of Community Benefits  
 Provided by ABHOW  
 2008

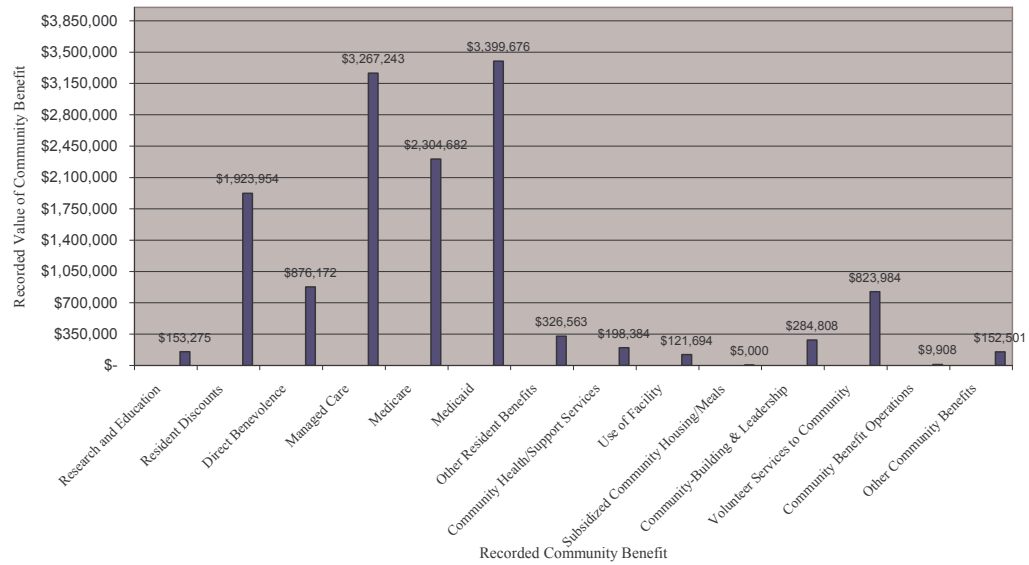


Table 5  
Total ABHOW Charitable Contributions  
2008

<b>Charitable Contributions to ABHOW Residents:</b>	
Participation in Medicare and Managed Care Programs - Contractual Adjustments	\$ 1,923,954
Direct Benevolence to CCRC residents	\$ 876,172
Managed Care	\$ 3,267,243
Medicare Adjustments	\$ 2,304,682
Medicaid Adjustments	\$ 3,399,676
Research and Education with Other Organizations	\$ 153,275
Other Community Benefits to ABHOW Residents	\$ 326,563
<b>Charitable Contributions Benefiting the Broader Community:</b>	
Community Health & Supportive Services	\$ 198,384
Use of the Retirement Community to Other Organizations	\$ 121,694
Community Building and Leadership	\$ 284,808
Subsidized Community Housing/Meals	\$ 5,000
Community Benefit Operations Activities	\$ 9,908
Volunteer Services to the Broader Community	\$ 823,984
Other Services to the Broader Community	<u>\$ 152,501</u>
<b>Total of All 2008 Charitable Contributions</b>	<b>\$ 13,847,844</b>
<b>Total Pure Charity - 2007-08</b>	<b>\$ 7,574,119</b>
<b>Total Tax Benefits Received in 2007-08</b>	<b>\$ 4,300,000</b>

January 2009

Table 6  
ABHOW Pure Charity Contributions  
2008

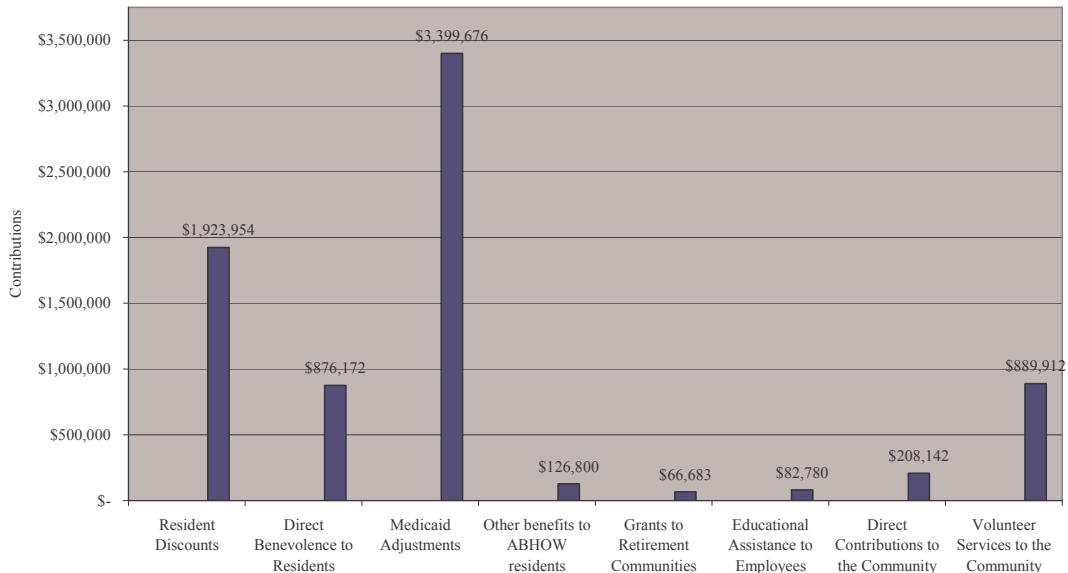


Table 7  
Community Benefits Provided and Received  
2007 and 2008 Comparative Data

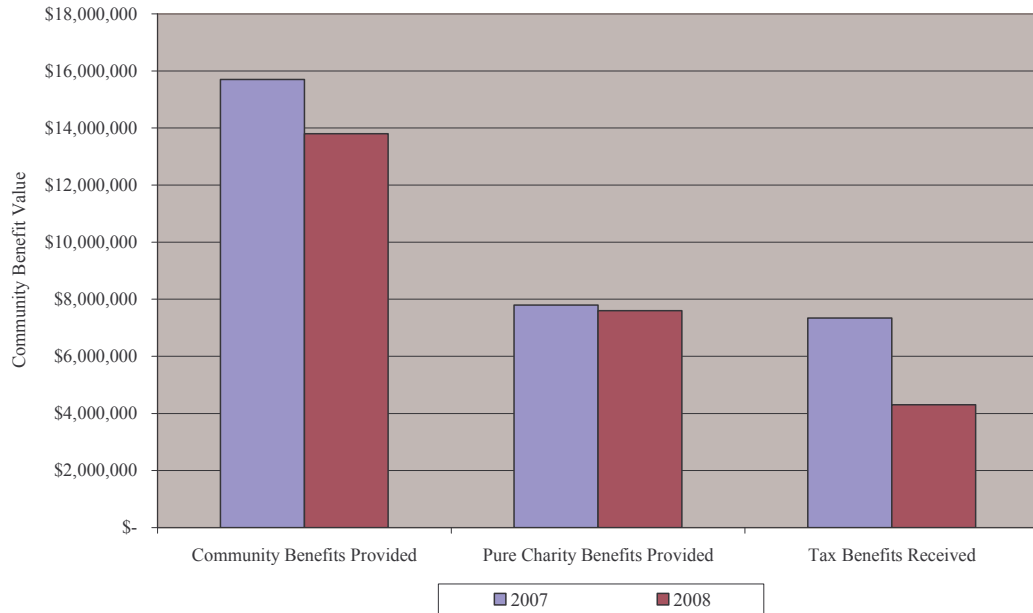


Chart 1  
ABHOW Charitable Benefits to Residents  
and Employees  
2008

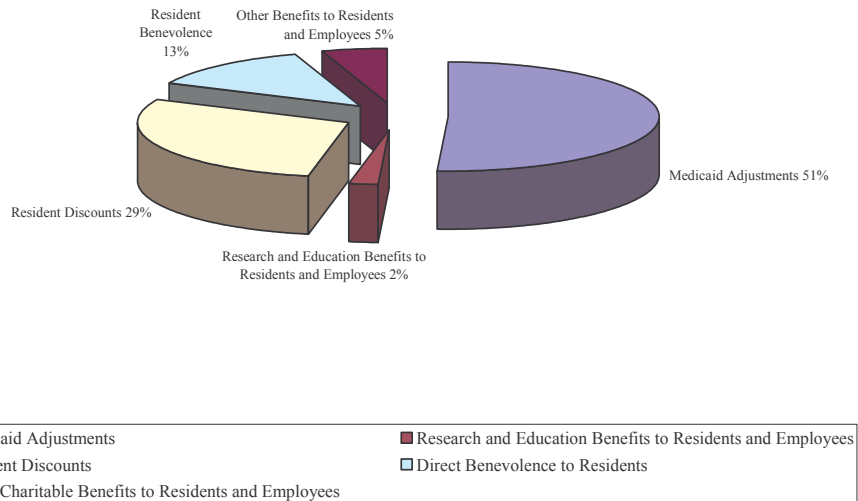


Chart 2  
Charitable Benefits to the  
Broader Community  
2008

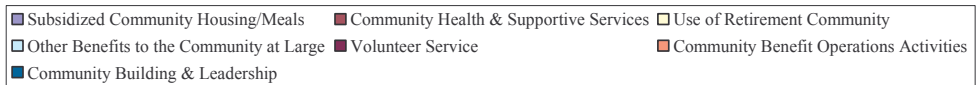
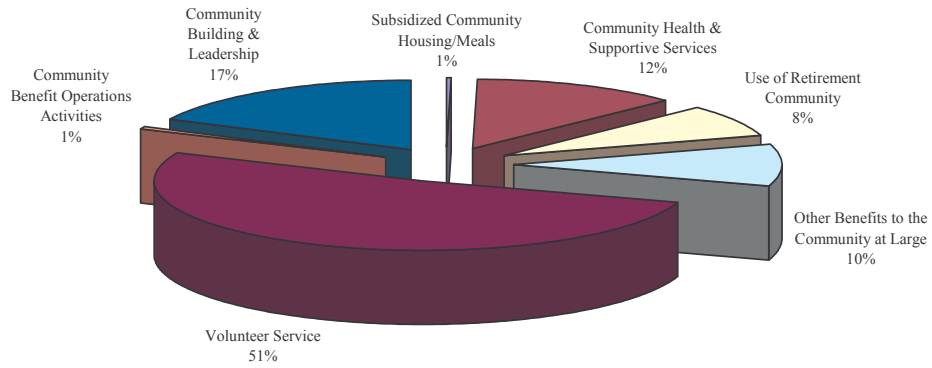


Chart 3  
ABHOW Pure Charity Contributions  
2008

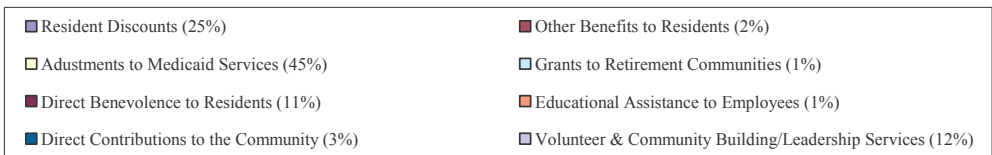
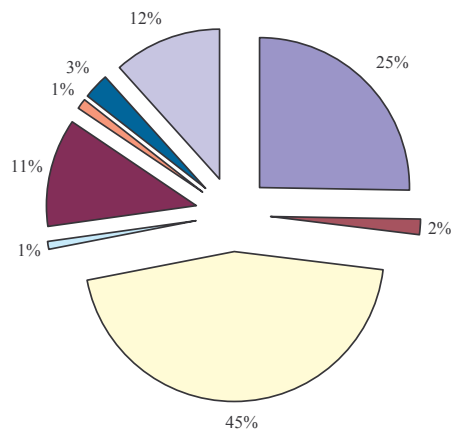


Chart 4  
Total Tax Benefits Received  
and Total pure Charity Benefits Provided

