

2019 ANNUAL REPORT



ON LOK®

A MESSAGE FROM THE CEO & BOARD CHAIR



Dear Friends,

We are excited and inspired by how much we have grown in 2019, both as a community and as an organization. Our programs benefited more older adults across the spectrum of care, empowering them to lead the active and independent lives we all hope for ourselves, and our loved ones, as we age. And, when faced with uncertain times and a rapidly evolving healthcare landscape, we have shown the responsiveness and resilience that have always characterized our organization and earned us the trust of our community.

Last year we hit a number of important milestones, reaching a census of more than 1,800 participants served by On Lok PACE and over 8,000 active seniors at On Lok 30th Street Senior Center. In the South Bay, we marked a decade of culturally competent, committed PACE care to Santa Clara County seniors and their families, as well as the expansion of our PACE service area to include the communities of Gilroy, Morgan Hill, and San Martin, which historically have had limited resources for the elderly.

Meeting the increasing need for services of a growing senior population in San Francisco, The Harry and Jeanette Weinberg On Lok Memory Care Center opened to provide specialized programming in a dedicated space for PACE participants living with the challenges of dementia, while On Lok 30th Street Senior Center celebrated 40 years of connecting active older adults to one another and to more than 50 programs and activities for health, wellness, and lifelong learning.

Our community and home-delivered meals program, Mission Nutrition, based at On Lok 30th Street Senior Center, is now delivering in the Sunset District of San Francisco. In 2019, On Lok Mission Nutrition served 88,000 community meals, 313 days a year including major holidays, and delivered another 130,000 hot meals to homebound seniors. The center continued to serve as the lead agency for the increasingly popular Always ActiveSM program of exercise and fall prevention classes, which opened its 20th site in San Francisco and today boasts a participation of more than 1,000 seniors and adults with disabilities. These services would not be possible without the continued support of our community, our partner organizations, and funding from the City and County of San Francisco Department of Disability and Aging Services.

Working with other community-based organizations has helped us reach more seniors, and in 2019 we formed strategic partnerships to bring our

time-tested model of care to other populations in need of services. Since 1998, Openhouse has been a leader in developing and delivering programs designed to meet the needs of LGBTQ seniors. Together, Openhouse and On Lok developed a care and services solution designed with the LGBTQ community for the LGBTQ community, coming in 2020. We also began working on new programs for active older adults, building on the success of our offerings at On Lok 30th Street Senior Center.

The year closed with two initiatives that resonated deeply with our Bay Area community. We were honored to join the San Francisco Reframing Aging Campaign to raise public awareness of ageism. We also hosted the biennial Senior Health Policy Forum with the Center for Elders' Independence (CEI), the Bay Area's other PACE organization, which brought together other organizations, stakeholders, and policymakers to exchange ideas and find a common voice as Bay Area senior safety-net providers and advocates. This latest forum focused on our aging homeless population, senior housing, the 2020 U.S. Census, and age-friendly livable communities.

In the midst of all this activity, last October we mourned the sudden loss of our dear friend, long-time supporter, and Board member, Dr. Wellman Tsang. A committed physician and community leader, Dr. Tsang worked to make a positive difference for people in need. He leaves a legacy of committed service to On Lok, leading our Board Quality Committee since 1987 and recently completing eight years of service as Board Chair. His contributions are a powerful reminder of who we are and what we stand for as a community and his presence will be missed by all who knew him.

We are fortunate to have a workforce that proudly carries on our values, providing high-touch care that enhances the dignity and quality of life of our participants and senior center community. Together, we continue to build on strong foundations to support more seniors across all stages of their lives, so they—we all—can age feeling empowered and connected to the community we love.

A handwritten signature in blue ink, appearing to read 'Grace Li'.

Grace Li
CEO

A handwritten signature in blue ink, appearing to read 'Kevin Gerber'.

Kevin Gerber
Chair, Board of Directors

On Lok Officers & Directors

As of June 30, 2019

On Lok, Inc.

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Vice Chair

Irene Riley

Secretary

Eric Harrison

Treasurer

Lyz Y.A. Ferguson

Directors

Joseph Barbaccia, MD

Gregory Chun

Alina Laguna, Esq.

Diane Lee

Grace Li, MHA, CEO

Darlene Mar

William Lock

Candy Rupp

Barbara Solomon

Wellman Tsang, MD

Sharon Yow

On Lok Senior Health Services

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Secretary

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Stephen D. Hester

Directors

Lyz Y.A. Ferguson

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Ben Lui, MD

Candy Rupp

Wellman Tsang, MD

Sharon Yow

On Lok Community Housing, Inc.

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Mike Neumann

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Secretary

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Directors

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Alina Laguna, Esq.

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Mike Neumann

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Secretary

Wanda Wong

Directors

Michele Lew

Grace Li, MHA, CEO

Barbara Solomon



On Lok Senior Executive Team

Grace Li, MHA

Chief Executive Officer

John V. Blazek, JD

Chief Development Officer

Gary Campanella, MBA

Chief Financial Officer

Eileen Kunz, MPH

Chief Government Affairs
& Compliance Officer

Jay Luxenberg, MD

Chief Medical Officer

Joy Moore, SPHR

Chief Human Resources
Officer

David C. Nolan

Chief Operating Officer

Valorie Villela

Director, On Lok 30th Street
Senior Center

Mike Webb

Chief Technology &
Information Security Officer

Diana Yin, MBA, MPP

Chief Strategy & Analytics
Officer

PROGRAM OF ALL-INCLUSIVE CARE FOR THE ELDERLY (PACE)

Caring for the Health and Well-being of the Whole Person

The Program of All-inclusive Care for the Elderly (PACE) created by On Lok is recognized as an outstanding model of integrated geriatric care and support services. PACE coordinates and provides all needed preventive, primary, acute and long-term care services, enabling seniors to live with dignity in their community instead of a nursing home. Currently, 132 PACE programs operate 264 PACE centers in 31 states, serving more than 51,000 participants nationwide.

Seniors enrolled in PACE are in the care of a dedicated team of physicians, nurses, social workers, physical and occupational therapists, dietitians, transportation staff, recreational activity leaders, behavioral and mental health specialists, home care workers, and specialists in dentistry, optometry, audiology, and podiatry. This interdisciplinary team meets regularly to exchange information and develop personalized care plans as the needs of PACE participants change.



TIMELINE

1971 In San Francisco, Dr. William L. Gee and social worker Marie-Louise Ansak create On Lok, a community-based model of healthcare for underserved seniors. On Lok means "peaceful, happy home" in Cantonese.

1973 On Lok launches one of the country's first senior day health centers, serving hot meals and providing health and social services to seniors living at home.

1975 On Lok adds in-home support services, primary care services, and case management of acute and chronic health services.

1979 On Lok launches a Medicare-funded model of long-term care, wherein an interdisciplinary team provides seniors with coordinated care plans and comprehensive medical care and social services.

1983 On Lok obtains waivers from Medicare and Medicaid to test a new financing method for long-term care.

1986 On Lok launches the Program of All-inclusive Care for the Elderly (PACE), a groundbreaking model of coordinated service delivery and innovative financing.

OUR FAMILY OF SERVICES



On Lok Lifeways

On Lok Lifeways is On Lok's Program of All-inclusive Care for the Elderly (PACE), providing the full spectrum of PACE services to empower more than 1,803 Bay Area seniors to live at home and in the community for as long as possible.

On Lok Lifeways PACE Centers

GEE CENTER

1333 Bush Street, San Francisco

POWELL CENTER

1441 Powell Street, San Francisco

30TH STREET CENTER

225 30th Street, 2nd Floor,
San Francisco

ON LOK LIFEWAYS AT IOA

3575 Geary Boulevard, San Francisco

PERALTA CENTER

3683 Peralta Boulevard,
Fremont

SAN JOSE CENTER

299 Stockton Avenue,
San Jose

EAST SAN JOSE CENTER

130 N. Jackson Avenue,
San Jose

On Lok 30th Street Senior Center

On Lok 30th Street Senior Center is the largest multi-purpose senior center in San Francisco, connecting over 8,000 active older adults with one another and with culturally sensitive programs for health and wellness, educational and social activities, and case management services. The center is the lead agency for Mission Nutrition, On Lok's community and home-delivered meals program, partially funded by the City and County of San Francisco Department of Disability and Aging Services, and the Always ActiveSM exercise and fall prevention program.

ON LOK 30TH STREET SENIOR CENTER

225 30th Street, 3rd Floor, San Francisco

On Lok Senior Housing

On Lok's housing program offers affordable and safe housing options for seniors in San Francisco. On Lok senior housing is located in three buildings:

MARIE-LOUISE ANSAK ON LOK HOUSE

1441 Powell Street, San Francisco

1000 MONTGOMERY HOUSE

1000 Montgomery Street, San Francisco

DR. WILLIAM L. GEE HOUSE

1333 Bush Street, San Francisco



Our Professional Services

ON LOK
PACEpartners
CONSULTING

A tradition of excellence in senior health care

PACEpartners offers customized consulting and technical assistance for all PACE programs across the world.

1994 On Lok opens the newly renovated Dr. William L. Gee Center in San Francisco. The National PACE Association, a nonprofit membership organization comprised of PACE sites, is formed.



1995 30th Street Senior Center becomes a part of On Lok's family of services.

1996 On Lok's PACE program opens two new centers in San Francisco—one in partnership with the Institute on Aging and the other at the 30th Street location.

1997 In the Balanced Budget Act of 1997, PACE becomes a permanent provider type under Medicare and a state option under Medicaid.

2002 On Lok opens a PACE Center in Fremont.

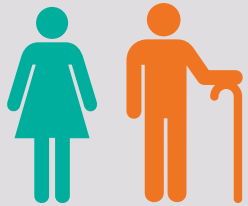
2009 On Lok opens a PACE Center in San Jose.



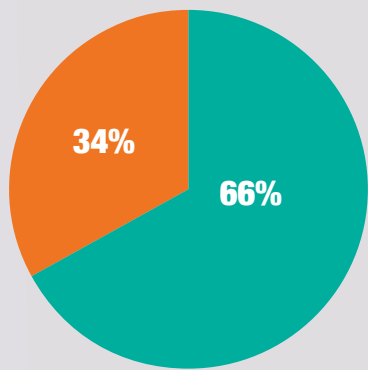
FACTS ABOUT OUR PACE PROGRAM

Number of Seniors Served

1,803

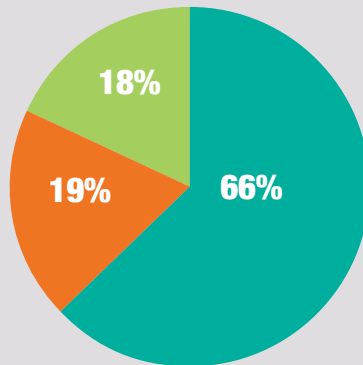


Gender



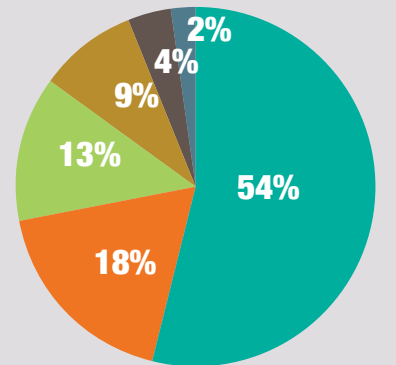
Female Male

Census Share by County



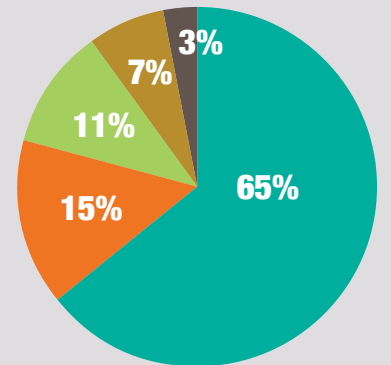
San Francisco
Tri-City & Alameda County (Fremont, Newark & Union City)
Santa Clara County

Languages



Chinese
English
Spanish
Other
Hindi
Korean

Diversity



Asian
Hispanic
Caucasian
Other
African American

Meals Served

240,153



Home-delivered Meals

208,564



Hours of Integrated Social Services

40,000



Medical Appointments

27,162



Miles Traveled to Transport Our Participants

630,000



TIMELINE

2012

On Lok opens the Peralta PACE Center in Fremont, in partnership with Eden Housing.



2014

On Lok opens the East San Jose Center.



2016

On Lok House, serving low-income seniors, undergoes a complete renovation.

2017

With a new 5,200 square-foot medical clinic, our East San Jose Center becomes a fully operational PACE center.

2018

On Lok House is renamed in honor of Founding Executive Director Marie-Louise Ansak.



On Lok 30th Street Senior Center

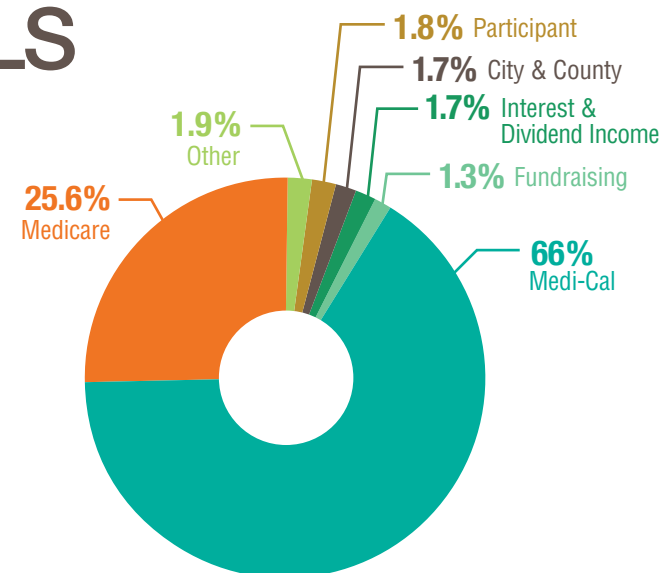
- In FY 2018-19, On Lok 30th Street Senior Center served over **8,000** independent older adults.
- Average age: **78**
- 63%** of participants are low income.
- 40%** live alone.
- At the center, seniors can access over **50** programs and activities, including arts and crafts, computer classes, music, dancing, exercise in our Happy Heart Gym, and gardening or relaxation in our beautiful garden.
- The center is the home base for On Lok's community meals and home-delivered meals programs, Mission Nutrition, serving **88,000** community meals at six dining sites in San Francisco and delivering another **130,000** meals to over **350** homebound seniors. **83%** of seniors served are very low-income; **35%** are over 85 years old. Meal programs are partially funded by the San Francisco Department of Disability and Aging Services.
- The center is the lead agency for the Always ActiveSM program, providing physical fitness and fall prevention classes to more than **1,000** older adults at **20** locations in the greater San Francisco area.

FY 2019 FINANCIALS

All figures in millions.

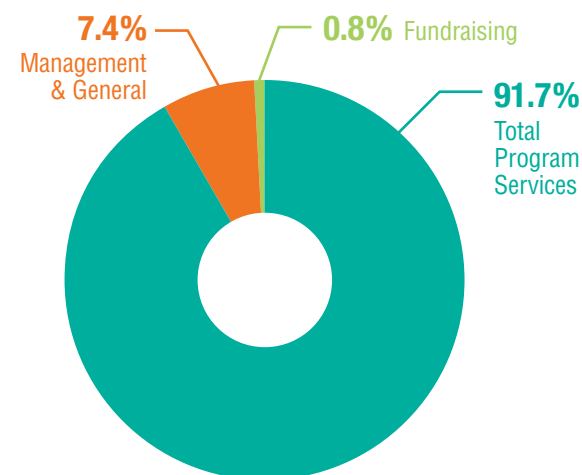
Revenue

Medicare	\$46.8
Medi-Cal	\$120.5
Participant	\$3.2
City & County	\$3
Interest & Dividend Income	\$3.2
Fundraising	\$2.5
Other	\$3.5
Total	\$182.7



Functional Expense

PACE Program	\$152.6
Senior Center Programs	\$4
Senior Housing & Facility Rental	\$4.1
Medicare Certified Home Health	\$2.7
Technical Assistance to Other Organizations	\$0.2
Community Day Service	\$0.1
Total Program Services	\$163.7
Fundraising	\$1.4
Management & General	\$13.2
Total	\$178.3



2019 On Lok opens The Harry and Jeanette Weinberg On Lok Memory Care Center in San Francisco.



2019 On Lok expands its service area in the South Bay and celebrates 10 years of PACE service in Santa Clara County.

2019 The community at On Lok 30th Street Senior Center with Precita Eyes artists create a new 850-square-foot mural in the center's garden.



2019 On Lok 30th Street Senior Center celebrates its 40th anniversary.

2019 On Lok and Openhouse co-design a senior program by the LGBTQ community, for the LGBTQ community.



THANK YOU

On Lok is a family of nonprofit organizations committed to developing healthcare models and providing services that enhance the well-being, dignity, and independence of older adults. On Lok is deeply grateful to our generous supporters, donors, and volunteers. Your ongoing support of our mission enables thousands of Bay Area seniors to lead fulfilling lives in their community for as long as possible. Thank you!

On Lok's Mission

To relentlessly pursue quality of life and quality of care for older adults and their families.



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415.292.8888
onlok.org