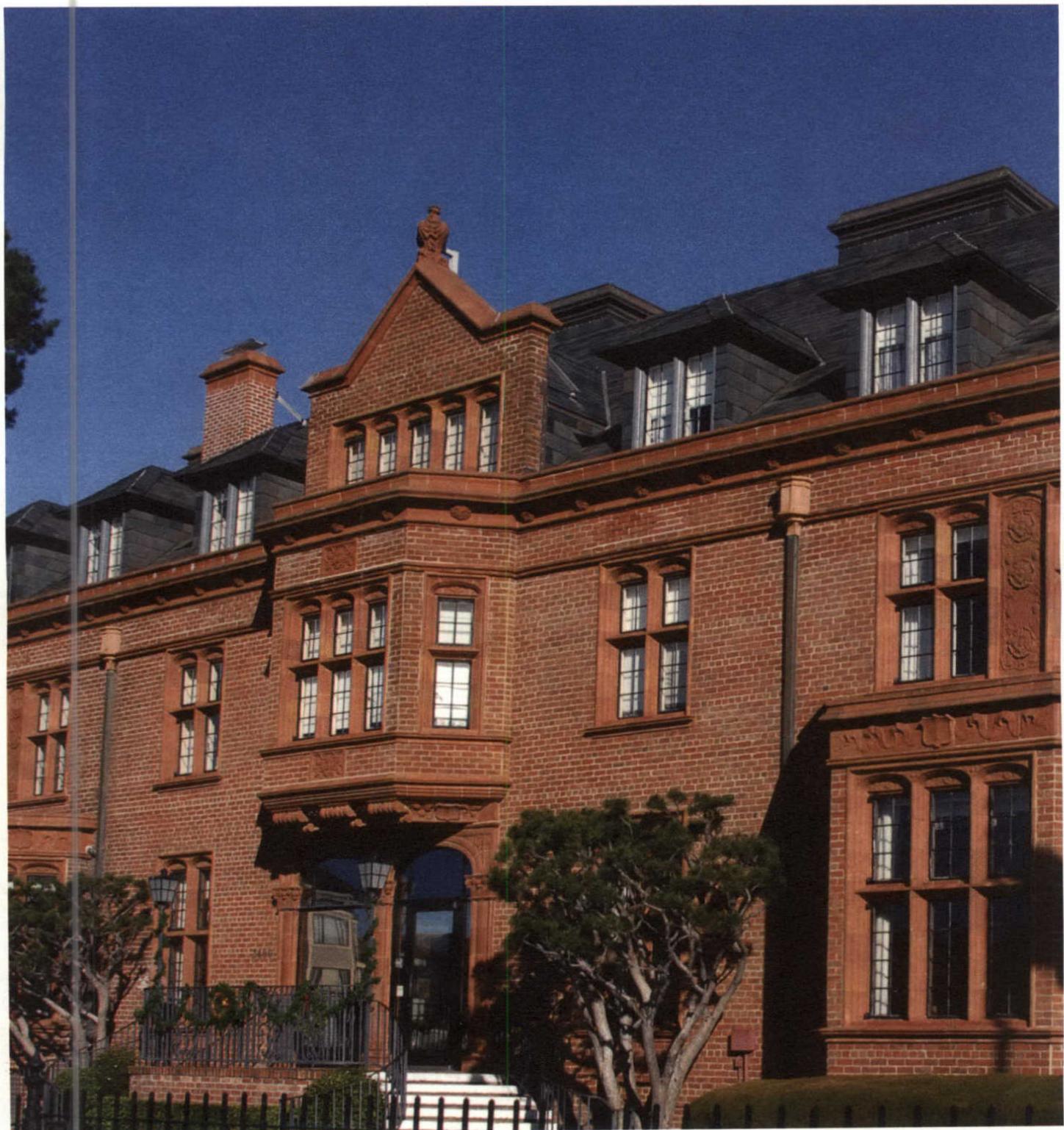


THE HERITAGE

HIGHLIGHTS 2012





OUR COMMITMENT

Message from the Chair of the Board of Directors

Our mission “to be an innovative and charitable model for serving the needs of seniors” was truly the Board’s focus throughout 2012. We continued to provide a personal and elegant home for our current residents, while looking forward to ensure that the seniors of the future will find The Heritage an invigorating and attractive location to call home.

We have several goals this year to accommodate our present and future residents. One goal focuses on more choice in the residential units within our community. We are developing our Francisco Street properties to provide larger units with fully-equipped kitchens for enhanced independent living. We have also been combining and remodeling studios in the Perry and Morgan buildings into one-bedroom units with kitchenettes.



Our increased emphasis on wellness programs is part of a continual, proactive approach to maintaining the health and vitality of our valued residents. The enthusiastic participation in the “Out and About” Program confirms that residents of The Heritage value an active lifestyle.

Furthermore, for the past several years, the Board has been engaged in a study of the needs of older adults of

the future, to assure that our programs provide the services and lifestyle they will expect. We have specifically identified opportunities to expand our programs to attract more assisted living residents and private patients in our Health Center, as we see both are areas of need within our San Francisco geographic area.

Delivering on the promise of the future requires strong leadership, experienced management and a dedicated staff. Mid-year, the Board determined the need for more assistance to implement all the programs and ideas identified within our strategic plan. To that end, a new position as Chief Executive Officer of The San Francisco Ladies' Protection and Relief Society, which operates The Heritage, was created to provide executive leadership for our organization. Ken D. Donnelly, formerly Executive Vice President of Institute on Aging and an experienced professional in executive management in senior services, joined The Heritage staff in July. After only a few months, Ken has moved many of our programs forward with the dual goal of increasing the services we provide to the community and strengthening the financial health of the organization.

In 2013, we proudly mark the 160th anniversary of The San Francisco Ladies' Protection and Relief Society, which has provided assistance to many different groups of San Franciscans across eight generations. We look forward to celebrating our history and our future with you during this year.



We extend our gratitude and thanks to all of you who share our commitment to the mission of The Heritage. In addition, we thank our generous donors, friends, volunteers, Board and staff for providing the support that makes it all possible.

Sincerely,

Laura Pilz

Chair of the Board of Directors

The San Francisco Ladies' Protection and Relief Society, which owns and operates The Heritage, has been serving San Francisco since 1853.



THE HERITAGE INSIGHTS

An Interview with new CEO, Ken D. Donnelly

The Board of Directors of the San Francisco Ladies' Protection and Relief Society (the Society) hired Ken D. Donnelly to the position of Chief Executive Officer in July 2012. Mr. Donnelly brings a rich background in older adult services, senior housing construction management, operations and finance. He served the previous 25 years in non-profit management at Motion Picture & Television Fund, Conard House and the last 17 years with Institute On Aging (IOA).

Interviewer: Mr. Donnelly, welcome. What interested you about the CEO position?

Mr. Donnelly: I made a career decision 25 years ago to involve myself in the "helping professions." I have always gravitated to older adults for their wisdom, life experience and outlook. After feeling that I had done all I could as the Executive Vice President at IOA these past several years, I was looking for a new opportunity to lead an organization into the demographic period that has been coined the "Silver Tsunami."

Interviewer: The CEO position is a new one for the organization. What have been your initial priorities in the six months since taking over?



stays as well as to those who can afford to pay privately for the high quality of care we offer.

Second, we need to expand the types of units we offer.

Mr. Donnelly: First was to learn more about senior residential care and the community at The Heritage. My background had been in the provision of senior services. While I brought together a partnership with a senior housing developer at IOA, there certainly was much to learn. Marla Hastings, Executive Director of The Heritage, has been very helpful in my overall acclimation and in introducing me to both the residents and the staff. Many of the Board of Directors for the Society had been discussing the future of the organization for a period of time prior to my appointment. I saw my role as bringing together a coherent strategic direction and shepherding the implementation into the future.

Interviewer: Can you tell us more about your vision for the future of the organization?

Mr. Donnelly: We want to become more of a community asset. First, we have a small, wonderful skilled nursing facility that we are striving to make more home-like. With the dearth of skilled beds available in the City and County of San Francisco, we feel that we can be offering between 5-10 beds to the community. These beds would be offered for Medicare-qualified

We are currently renovating two adjoining properties on Francisco Street. When the project is completed, we will have seven additional units — two two-bedroom flats and five one-bedroom units. These units will have a full kitchen and more square footage for living independently.

Finally, we are looking at more diverse residential and services packages that will appeal to both the current prospective resident but also the future (Baby Boomer) resident.

Interviewer: Any other thoughts you would like to share?

Mr. Donnelly: I am very excited for the future of the organization. We have a dedicated and knowledgeable Board of Directors. Our staff is top-notch. And many of the Board members and staff have been with the organization for many years.

Lastly, I would like to say that the community of residents at The Heritage are a warm and caring group who appreciate San Francisco, living in the Marina District and each other. I appreciate everyone's confidence in me.



THE DIRECTOR'S UPDATE

Message from the Executive Director

Dear Friends: When I have the opportunity to greet newcomers to The Heritage, it is always a great pleasure for two reasons. Their first reaction is one of delight in the beauty of our buildings and grounds, while their second observation is usually about the quality interaction between residents and staff. With an average population of 100 residents, we can be, and are, considered to be a family.

As a family, we're vibrant. We're creative. We're always thinking about what changes we can contribute to the greater good of our community.

There is a growing interest in focusing on a fine dining experience for our residents, not only in our main dining room but also at the higher levels of care, such as our skilled nursing facility. To help meet this goal, The Heritage has transitioned the way service is being delivered in the main dining room. Just like a fine downtown restaurant, leather menu holders with the entrees of the day now start each evening meal. Rather than presenting the starter salad, it's delivered fresh upon ordering. We have also upgraded the Kitchen Manager position to Executive Chef, and look forward to utilizing his talent in the main and skilled nursing dining rooms as



In addition, residents wanted easier access to the top level of our Porter Garden. A beautiful new ramp has been installed with colorful accenting tile work. A particularly talented group of residents tend to the potted plants in this area, making it a pleasant destination for all.

As a community, residents are mindful of their own well-being and support each other in maintaining a balanced approach to their lives. Our Well-Being Coordinator, Althea Kippes, continues to be in demand assisting residents in setting their well-being goals and in broadening their fitness



we continue to enhance our dining experience.

Residents wanted more van service so that they could attend weekend and evening cultural events like the symphony. That's why we now provide additional service one evening a week and on Saturday/Sunday afternoons. The evening van service has lent itself nicely to groups of residents having dinner out on the town. Our "Out and About" Program, endowed by the Barrett and Margaret Hindes Foundation, continues to bring new adventures to our residents as they participate in scenic tours and outings to destinations like Samuel P. Taylor Park and the historical sights of Sonoma.

world. The location of The Heritage in a park-like setting with views of Fort Mason, the Golden Gate Bridge and San Francisco Bay turns the concept of exercise into an adventure.



We look forward to a 2013 that will bring many positive changes as we continue to grow and build upon the strong foundation that is The Heritage.

Marla Long Hastings
Executive Director

OUR NEW LOOK

Expanding Our Residential Units



Bright lighting. Appliances for cooking. More room to stretch out. The Heritage has been expanding the size of a number of units to offer our residents more amenities than ever before. We've recently

begun to remodel two of our two-bedroom flats and five one-bedroom units, all with fully-equipped kitchens, to enable our residents more square footage "for more comfortable independent living."



HOME IMPROVEMENT

Residents' Council Report

As President of the Council, my first thoughts about 2012 are about our excellent committee members who contributed so much in making last year successful.

With input from the Council, several improvements were made within our community. We gratefully thank the Board for these changes:

- A ramp was installed in the Porter Garden to enable residents to more easily access the back garden area.
- Another ramp was installed outside the parking lot exit.
- Van service was expanded to provide Thursday evening and weekend coverage.
- New carpeting was installed in our dining room.

Our Committee voted to open its meetings to more input from residents. We continue to invite all residents to the meetings and welcome their participation.

RESIDENTS' CORNER

What's On Your Bucket List?



Anna Capurro had "Ride the Ducks" on her bucket list for some time. When an opportunity arose for a Heritage sponsored activity, she spearheaded a tour for Heritage residents.

It was a full house, or full boat one should say. The amphibious vehicle picked up 35 residents outside our building, drove through San Francisco for a little sightseeing and then splashed down in the Bay for a short cruise around McCovey Cove near AT&T Park. One lucky resident, Gloria Learned, was celebrating her birthday that day and got to drive the vehicle... right into the water! We think these smiles tell the story of just how much fun was had.

STAIRWAY WALKS

Keeping Fit

For the second year, we adopted the Head Start Toddler's Class in the Bayview District. Residents knitted hats and scarves, raised money for other gifts for the children and delivered them personally in December.



THE WHITE ELEPHANT SALE The White Elephant Sale was a success again, as it is every year. I thank all of the residents who contributed their white elephants as donations to raise funds, and more importantly I thank those who contributed their time and labor. The proceeds from the sale are donated to the Employee Appreciation Fund.

We also participated in a fundraising effort through the generosity of the See's Candies organization, which provided additional contributions to "sweeten" the Employee Appreciation Fund.



This was my third (non-consecutive) year as President. It is a pleasure to work with and for our residents. My thanks to all the residents and staff who helped to make it so easy and worthwhile.

Doris Howard
Residents' Council President

Resident Mercedes Van Den Berg has always been very active and very fit. She's a regular at the Presidio YMCA and actively walks around our wonderful neighborhood. Now, she has established a new goal. "When the 7th edition of Stairway Walks in San Francisco came out with its beautiful cover of the mosaic stairway at 16th Avenue and Moraga in the Sunset District, my friend and I decided to do all of the stairway walks listed in the book. So far, we have done 14 of the 29." The Lyon Street stairs remain her favorite.



OUR GOLDEN HISTORY

Celebrating 160 Years of Service to San Francisco

The Heritage is owned and operated by the San Francisco Ladies' Protection and Relief Society, one of the City's oldest and best-established charitable organizations. Both have fascinating histories, as richly colorful as San Francisco itself. And, just like the city that has been dubbed "Baghdad by the Bay," their real stories began with a few shiny nuggets of gold.

The Year Was 1848

San Francisco was just a tiny port city with a population of under 1,000 people. Then, a huge gold nugget was discovered on January 24th at Sutter's Fort near Sacramento, igniting a worldwide gold rush.

A Golden Legacy Sprung From The Wild West

Over the next few years, San Francisco quickly became the hub for traveling prospectors, who needed to trade handfuls of nuggets for cash — beginning the city's long-standing tradition as a financial epicenter.

By 1853, the city had exploded to about 50,000 residents, mostly men between the ages of 20 and 40. This certainly was the



A Board of Managers was formed and memberships were sold; originally at \$5 for an Annual Membership, \$20 for Honorary Membership and \$50 for Lifetime Membership. San Francisco's most distinguished citizens counted themselves among the proud supporters.

The Early Years

From 1853-1856, the Society focused on boarding women in benefactors' homes, while operating an employment agency to provide women with jobs and wages. In 1857, the Society established its first dedicated care home at 2nd and Tehama Streets, renting for just \$25 a month. Furniture was donated from the homes of Society members; merchants along Front Street were asked to grant provisions, and soon the new Hospitality House was ready for guests.

Wild, Wild West!

But as the original “49ers” caught “gold fever” and sought their fortunes in the muddy rivers and streams of Central California, they often abandoned their families who were left behind in San Francisco.

How The Ladies' Protection and Relief Society Began

Women and children were often seen on the streets, seeking shelter and food. One such woman knocked on the door of Mrs. A. B. Eaton, who took her in. Seeing the poor woman's plight — and knowing she shared it with so many others — Mrs. Eaton gathered a church full of acquaintances to discuss how to best aid these women in need. This marked the formation of the San Francisco Ladies' Protection and Relief Society in 1853 “to render Protection and Assistance to strangers, to sick and dependent Women and Children”.



A Generous Gift from Horace Hawes

It wasn't long before the Society outgrew the rented house. Then one Board member approached a benevolent San Franciscan, Horace Hawes, about donating undeveloped land. He made a generous gift of one city block, bordered by Van Ness, Geary, Franklin and Post — an area of barren sand dunes at the time but home to Tommy's Joynt and other businesses today.

A PARTIAL TIMELINE

1853 The San Francisco Ladies' Protection and Relief Society is founded.

1857 The Society founds a home for women and children needing shelter.

1921 A new program by State authorities of placing children in foster homes diminishes the need for children's homes.

1922 The Society decides to change its focus from children to elderly women and convalescents.

March 1922 The Society acquires property bounded by Francisco, Bay, Laguna, and Octavia Streets (former site of the “Gay Way,” a concession area at the Panama Pacific Exposition).

March 1923 The trustees approve architect Miss Julia Morgan's plans for the Laguna Street building

that will become known as The Heritage.

Summer 1923 The Ladies' Home for children on Franklin Street closes its doors.

March 1925 The Society's new home for elderly women and convalescents on Laguna Street begins operation.

1953 The Society celebrates its centennial.

1954 The San Francisco Ladies' Protection and Relief Society and the Crocker Old People's Home plan a merger. Architect Warren Perry begins plans to enlarge the home on Laguna Street to accommodate residents of both homes.

1957 Former residents of the Crocker Old People's Home move in and become part of the family at the Society's home on Laguna

The Board raised funds to build there, and asked architect S. C. Bugbee to donate his talents to draft plans for a large home that would house thousands in need over the next 65 years. Mrs. James Robinson, daughter of Horace Hawes, introduced a brilliant means of funding when she installed collection boxes targeting the steamships making port in San Francisco. (One of these collection boxes is permanently installed today in The Heritage lobby.)

The Franklin Street house, which came to be known affectionately as the "Old Brown Ark," was primarily used as an orphanage but also housed indigent mothers and elderly women.

The Roaring 20s and Julia Morgan

In the early 1920's, the government mandated foster care as the preferred choice for children, prompting the "Ark" to close. However, the need to care for San Francisco's elderly women had now become more important than ever.

In 1922, The Heritage's current land site was donated by a generous benefactor, Mrs. Kate F. Austin, after the then empty block within the Marina District had been used as part of the extended site of the 1915 Panama-Pacific International Exposition. Julia Morgan, the first female architect in California, renowned for her work



San Francisco's elderly women and children. When it was completed in 1925, sisters Edith and Lucy Allyne, direct descendants of local pioneers, donated half the funds to purchase apartments on adjoining properties to house members of the home's staff.



In 1931, six-year-old Flora Zagorites played in Funston Park (now Moscone Field). Today, she's a resident of The Heritage (shown in the background).

The 1950s: A New Name

By 1957, the need for convalescent care had declined, and the Ladies' Protection and Relief Society merged with the Crocker Old People's Home. Then, for the first time, we began offering all-inclusive contracts that included apartments, meals and on-site medical care.

After the merger in 1959, Captain Barrett Hindes, President of the Board of Trustees, led the Board in determining a name search for the newly focused organization. With over 100 names considered, one rang the truest: The Heritage. He noted: "Heritage is something you cannot buy. You just come by it through a lifelong worthiness." And so, we became The Heritage.

The 21st Century Evolution of a San Francisco Landmark

Since then, The Heritage has only grown more refined and specific in its focus. Our lovingly maintained

on the Hearst Castle, the Fairmont Hotel, Mills College and many other projects, was enlisted to design a home of elegance and stature to provide convalescent care to



Street. The Laguna Street home becomes certified as a Life Care Retirement facility.

May 1959 The enlarged home on Laguna Street is named THE HERITAGE.

1963 A Health Center (Skilled Nursing Facility) is built at The Heritage.

1977 The Heritage establishes the Chinatown Kitchen meal program

in collaboration with Self-Help for the Elderly.

1986 The Health Center is substantially remodeled and Friendship Hall is built.

October 1989 A major earthquake strikes Northern California and cancels the World Series between the Giants and A's, but The Heritage emerges almost untouched.

grounds and facility attest to the attitude of caring that is pervasive throughout The Heritage culture.

Now in our 160th year, the San Francisco Ladies' Protection and Relief Society continues to be a vital force in responding to the needs of an ever-changing city and residents who have an active voice in their community. The traditions of excellence, graciousness, feelings of home and family, as well as a spirit of generosity, remain as our cornerstones.



1996 The Heritage main dining room is remodeled.

2000 The San Francisco Ladies' Protection and Relief Society Board of Trustees combines with the Board of Managers to form a new Board of Directors.

2002 The original slate roof on The Heritage is replaced.

2003 The Heritage celebrates its 150th anniversary.

2009 Wireless Internet added within the units and throughout the facility.

2012 Board approved Medicare Certification and expanded Assisted Living allows residents to enter into this program directly.

2013 Additional, larger units are developed on Francisco Street.

2013 The Heritage celebrates 160 years of serving San Francisco.

HIGHLIGHTS 2012

STAFF LONGEVITY

Our Loyal Employees

When residents come through our doorways, they tend to stay here a long time. While our residents' longevity is impressive, our employees' commitment to The Heritage is equally impressive. Our staff members have an amazing 1,197 years of collective service. In fact, over 50% of employees have worked at The Heritage for 20 years and we're proud to boast six employees in particular who have each worked with us for over 30 years:

- Longest in tenure is John Killeen, previous Director of Activities and Social Services, now Activities Assistant, who has been with The Heritage for nearly 40 years.
- Monina Pascual has been with us for 35 years; she is a CNA/Ward Clerk.
- Tony Lawrence, Health Center Dining Coordinator has an impressive 34 years of service.
- Norma Lobo, a Food Server, has been here nearly 34 years.
- Rosebelle Javier, CNA and van driver, has 32 years of service.
- And Elvira Martiniano, also in Food Service, has been here for 31 years.



Left to Right, Back Row: Marla Hastings, Elvira "Elvie" Martiniano, Rosebelle Javier, Anthony "Tony" Lawrence, John Killeen;
Front row: Norma Lobo, Monina Pascual.

What is The Heritage's secret to success? Why have these loyal employees each worked here for so long? "This business has changed a great deal over the years, but one thing hasn't changed — the dedication and service of our employees," says Marla Hastings, Executive Director. "A stable workforce means a lot in a retirement community, where long-term relationships create the foundation for excellent care and quality of life."

A recognition luncheon was held recently in our main dining room, so residents as well as staff could celebrate this notable accomplishment. Each of the honorees was presented with a trophy, a framed certificate, a lapel pin and flowers.

PROFESSORS' BENCH

Daily Life Lectures



On sunny afternoons, retired professors — Walter Sokel (literature) and Harold Levine (mathematics) — spend quality time on their favorite bench. Here, these residents of The Heritage chat about their life experiences, talk about their favorite San Francisco sports teams and wax poetic about the world's problems.



WHY WE LIKE IT HERE!

What Residents Say About Life at The Heritage

"I moved into The Heritage at age 75, while I still was reasonably able physically and mentally to decide my own future. I gave up stairs and stuff for peace of mind and security. The adjustment was made easy by friendly, helpful and supportive staff and neighbors — a welcoming community of interesting and interested people. I continue to lead my life as before, but with a larger circle of friends. And I love to brag that Julia Morgan designed my house!" — J.F., age 76

 Moving to The Heritage was one of the best decisions I've ever made. I'm enjoying the elegant surroundings, the camaraderie with my fellow residents and a wide variety of activities. We have a lovely life here." — K.C., age 80



HIGHLIGHTS 2012

WITH GRATITUDE

A Heartfelt Thanks to Our 2012 Supporters

The Heritage's rich history is made possible from the generosity of past donors. Today's donors are adding a new page to that history. We owe our existence to our supporters throughout the years. We are deeply grateful.

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Hazel Wynne
Irene Mosher
Catharine Zeller
Mrs. Carol Clark
Mrs. Kathryn Peterson

An Inside Look at The America's Cup

Julia Morgan

Concerts

An Evening of Chanson and Cabaret with Lua Hadar and Allison Lovejoy

Cello and Piano – Robert Howard and Keisuke Nakagoshi

Marin Men's Chorus

Celebrating Mexican Independence Day with Chili y Limon

NEED A HAND?

We're Here to Help!

When you or a loved one may need a little extra help, we want you to know that The Heritage is here for you.

We now accept individuals directly into our Assisted Living program. This enables residents to enjoy the gracious Heritage lifestyle while receiving supportive help with the various activities of daily living.

For more information, contact our Director of Marketing at 415.202.0300.



The Heritage has a rich offering of concerts, classes and lectures, all designed to enrich our residents' lives.

To share our cultural resources with the outside community, we have recently made some of these activities accessible to our Club Heritage membership. For a modest quarterly fee, Club Heritage members can attend these events.

For more information about the Club, contact our Director of Marketing at 415.202.0300.

BRAIN FOOD

Life at The Heritage



The Heritage residents have plenty of opportunities for stimulating the intellect and feeding the soul. Imagine enjoying an intimate cello concert in our gracious Morgan Hall, or walking a few steps down to Friendship Hall to participate in a lecture.

Here is a sampling of Heritage experiences during this past year:

Lectures

San Francisco Opera's preview of the upcoming season

Art of the Silk Road

The Paley Collection

City of White and Gold – *San Francisco in the Gilded Age*

Meet the Magic – *An Inside Look at the Magic Theater*

Men of Dance – *Fred Astaire and Gene Kelly on the big screen*

Healthy Bones for Life

HEALTH CARE UPDATE

Skilled Nursing at The Heritage

Our Health Center staff take great pride in their work and are committed to providing exceptional, compassionate care around the clock. As space is available, we admit private patients into our Health Center.

Contact our Director of Marketing at 415.202.0300 for more information and rates.

WEBSITE MAKEOVER

Our New Digital Look

Here at The Heritage, we're keeping busy staying current. We know that prospective residents visit numerous communities several times before choosing one as their home. And more and more, people use the Internet as the first step when researching communities to visit.

Our website, theheritagesf.org, was in need of some refreshing; a new look will be launched mid-2013 and will include photos and videos that portray what it's like to live at The Heritage.

ABOUT CLUB HERITAGE

Where Senior Membership Has Its Benefits

Jeanie S. Kayser-Jones & Theo Jones
Gretchen B. Kimball
Althea T. Kippes
Konrad & Barbara Krause
Professor Harold Levine
Jane Lewis
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Patricia Gallagher
Thura De Lopez
Patricia Gallagher
Patricia Gallagher
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160 Years of Service and Dedication

Below are listed the names of women and men who have served on the San Francisco Ladies' Protection and Relief Society boards, giving their time, hard work and resources to serve the community. *Peruse the names, and you might find your own family has a long-forgotten connection to the Society.*

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The Mission of The San Francisco Ladies' Protection and Relief Society is to be an innovative, charitable model for serving the needs of seniors, and to utilize its resources and expertise to serve the San Francisco community.

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The Heritage honors our former Board Member
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