

# HOME FOR LIFE

## PERMANENT HOME FOR LIFEHOUSE

### Final Phase of the Campaign PAY OFF THE MORTGAGE

#### A Springboard to Increased Impact

- The Lifehouse monthly mortgage now costs less than our previous leased offices.
- The Lifehouse building has over 3000 sq ft additional office space.
- Lifehouse has been compelled to move offices every six years due to increased lease costs and increased capacity needs. In this permanent home, Lifehouse is now seen as an anchor in the community.
- The monthly cost savings translates to direct service enhancements.
- Lifehouse now has a secure asset on its books and increased financial security.



This permanent home for Lifehouse professionalizes the services and providers of this sector, offering the Bay Area a symbol of its diversity, optimism and the dignity it affords a traditionally 'unseen' community.

## GROWTH & EXPANSION OF LIFEHOUSE

### Lifehouse Today

- Lifehouse is now the largest agency supporting people with intellectual and developmental disabilities (I/DD) in the Bay Area.
- Lifehouse now serves more than 370 individuals with I/DD and employs 500 staff.
- Lifehouse continues to lead efforts to evolve the field of practice in care provision to people with I/DD.
- Person-Centered Thinking philosophy leads the focus of care at Lifehouse that elevates and nurtures each individual.
- This organization is performing cutting edge work and is growing at an incredible rate, providing services to more people every year.
- The Lifehouse budget has grown from \$3,000,000 in 2000 to \$35,891,962 for FY 2022/2023.

### Lifehouse During COVID

- 140 new staff have been hired
- 44 new individuals supported by Lifehouse
- Hiring and onboarding made virtual
- Virtual Training Center

### Looking to the Future

Here we are in 2022 and find ourselves at a critical point in history as the nation recovers from the global pandemic, a crisis that has disproportionately impacted the lives of people with I/DD.

Lifehouse will continue to provide life-changing services and powerful advocacy to ensure that people with I/DD can fully participate in society. This impressive legacy guides us in the future, enhancing our impact in responding to the evolving needs of people with I/DD living in our community.

# HOME FOR LIFE

## CAMPAIGN FOR A PERMANENT HOME FOR LIFEHOUSE

### TESTIMONIALS

#### LIFEHOUSE HISTORY

*“Lifeshouse has served the needs of these most vulnerable members of our community for 65 years. With support from the public, I am confident Lifeshouse will continue to thrive and serve our families and friends for another 65 years!”*

Joe Spinelli

Director Emeritus (on and off for the past 50 years)  
Father of Stephen Spinelli, Former Lifeshouse Resident



#### BAY AREA COMMUNITY



*“I find myself reflecting on the countless lives that Lifeshouse has touched, enriched and improved over all these years. One can only imagine the cumulative life benefits that have been offered to these many individuals and families. You’ve crafted your services with a demonstrable belief in the positive potential for each life you touch, and you’ve done so with an overarching tone of respect and kindness. This is a time to pause for reflection on how much these characteristics have meant to your clients, and also how much this has meant to the humanity and vitality of the whole community. Please share heartfelt thanks and appreciation from all of us at MCF.”*

Thomas Peters, Ph.D., Former President & CEO  
Marin Community Foundation

*“Lifeshouse’s wonderful clients are some of our most treasured employees, reminding all of us that life is rich and diverse and people of all capacities have much to contribute to our collective well-being. Lifeshouse deserves a proper home and a permanent place in our community.”*

Robert Mayfield

Safeway San Anselmo Manager  
2018 Lifeshouse Employer of the Year Award



#### LIFEHOUSE FAMILY

*“With a strong foundation and more control over future expenditures, this permanent home for Lifeshouse accompanies an acknowledgment of the great gifts our children and loved ones offer while providing them the means to independence and a better life.”*

Allan & Nancy Herzog  
Lifeshouse Parent and Former Board Member



## BOARD MEMBER

*" This permanent home for Lifehouse is a gift to the whole Bay Area community, acknowledging and celebrating the diversity and richness of our population with pride."*

Eric Aanes  
Lifehouse Board Vice Chair



## LONGTERM PRESENCE

*" Equity and worth of every person were essential values that my parents, DeReath and Daniel Collins, instilled in our family. They collaborated to create institutions and organizations to ensure the sustainability of this work for future generations and were instrumental in the founding of Lifehouse in 1954. My parents understood that equality and equity were two sides of the same coin yet different and distinct. True equality requires that we address the systemic and historical circumstances, attitudes and habits that prevent some people from having fair access to the fullness of life. This is why they fought persistently to lay the foundations of Lifehouse and the Lanterman Act to address the problems, challenges and opportunities for all people to live full and complete lives.*

*On the 65th anniversary of Lifehouse, it is critical to seek a permanent home to ensure each child, youth and adult will reach their highest potential and by their humanity and engagement in the broader community, contribute to the common cause."*



Charles Collins  
President and CEO of the YMCA of San Francisco  
Brother of Craig Collins, Former Lifehouse Resident

## AUTISM COMMUNITY



*" We are so grateful that Lifehouse provides the extensive and specialized care these individuals need in order to thrive. The skills and consistent support offered by Lifehouse staff who will benefit from the training rooms at the new facility will only enhance the services already offered."*

Mark & Patty Jackson  
Lifehouse Parents; Mark is Lifehouse Board Member

# HOME FOR LIFE

## BOARD OF DIRECTORS

### **Doug Clough, Chair**

Managing Director, Wealth Adviser, First Republic Private Wealth Management; Lifehouse Parent

### **Stephen Meeker, Immediate Past Chair**

Retired, Senior Vice President, HUB International; Lifehouse Parent

### **Eric Aanes, Vice Chair**

President, Titus Wealth Management

### **James Ricks, Secretary**

Retired, EPA

### **Ginny Quick, Treasurer**

Nonprofit Financial and Investment Management Consultant

### **Nancy Dow Moody, President & CEO**

Lifehouse

### **Dr. Joseph Spinelli, Director Emeritus**

Retired UCSF Veterinarian; Lifehouse Parent

### **Alan Brayton**

Senior Partner, Brayton Purcell, LLP; Owner, Thirty-Seven Wines

### **Rita Curtis**

Lifehouse Resident

### **Lia Economopoulos**

VP/Relationship Manager, Bank of San Francisco

### **Daniel C. Engel**

Retired, Independent Energy/Efficiency Demand Response Consultant;  
Volunteer, Marin Special Olympics

### **Andrea Henderson**

Vice President, Director of Marketing, Bank of Marin

### **Mark Jackson**

Consultant, Peak Partners LLC, Lifehouse Parent

### **Susan McFadden**

Retired, Bank of Marin

### **Paul Smith**

Attorney, Hooper, Lundy & Bookman

### **Justin Tedford**

Lifehouse Resident, MA Candidate in English Literature, San Francisco State University

### **Dr. Marsha Treadwell**

Professor of Pediatrics/Division of Hematology, UCSF Benioff Children's Hospitals

## LIFEHOUSE ADVISORY COUNCIL

**Mary Jane Burke**

Marin County Superintendent of Schools

**Patty Garbarino**

President of Marin Sanitary Service

**Pat Kendall**

Kaiser Permanente Administrator

**Assemblymember Marc Levine**

Assemblymember (D) representing California's 10th Assembly District

**Marc Loupe**

Former Lifehouse Board Member

**Congressman Jared Huffman**

Representative (D) representing California's Second District

**Jim Shorter**

Former Executive Director of Golden Gate Regional Center

**Paul Brannan**

Schwab Vice President

## LIFEHOUSE LEADERSHIP TEAM

**Nancy Dow Moody**

President & CEO

**Tim Evans**

Chief Operations Office

**Viola Morris**

Chief Finance Officer

**Ann Elias**

Chief Development Officer

**Katie Petcavich**

Vice President of Human Resources

**Kate O'Connor**

Director of Programs & Operations

**Lisa Ann Carbone**

Director of Programs & Operations

# HOME FOR LIFE

## ABOUT LIFEHOUSE

Lifehouse has supported the needs of individuals with developmental disabilities in our community since 1954. In this time Lifehouse has evolved from a preschool launched by parents who believed their children could live and learn well in the community, to one the largest nonprofit organization in the Bay Area.

Lifehouse believes all individuals deserve the right to independent lives filled with integrity, joy and aspiration. The array of services support this belief and offer a variety of approaches to meet the requirements of each individual.

“

*The efficacy of Lifehouse programs has demonstrated the importance of support and care in an individual's home. The closure of other providers has contributed to a growing need for Lifehouse services. Lifehouse is best equipped and suited to deliver these services. I take great pride in being a part of this expansion.*

”

Al Brayton  
Lifehouse Board Member



Lisa & Al Brayton

# LIFEHOUSE BUDGET

## CONSOLIDATED STATEMENT OF ACTIVITIES Fiscal Year: July 1, 2020 to June 30, 2021

### REVENUE & SUPPORT

Client Fees	27,693,793
Investment & Interest Income	331,239
Other Income	111,024
Contributions, Inkind & Events	865,726
	681,345

**TOTAL SUPPORT & REVENUE 29,683,127**

### EXPENSES

Program Services	2,061,600
Intermediate Care Facilities	712,999
Independent Living	22,314,067
Supported Living	448,565
Other Programs	2,021,685
General & Administrative	700,644
Fundraising	2,709
Fundraising - Capital Campaign	2,709

**TOTAL EXPENSES 28,262,269**

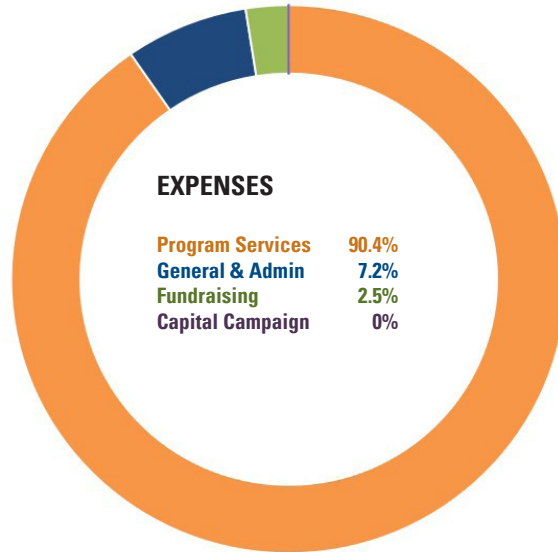
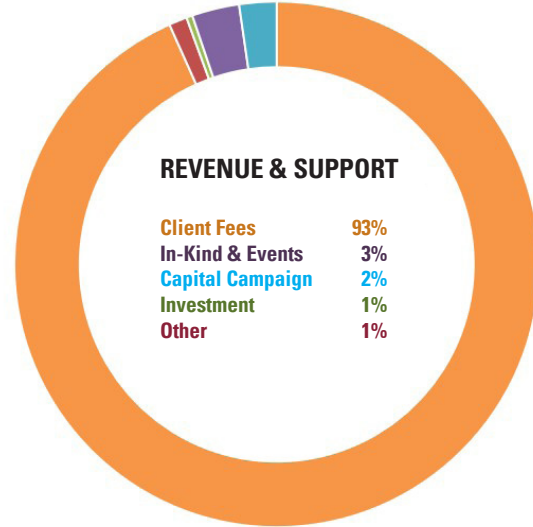
## CONSOLIDATED STATEMENT OF FINANCIAL POSITION As of June 30, 2021

### ASSETS

Current	4,641,611
Other Assets	9,056,277
<b>TOTAL ASSETS</b>	<b>13,697,888</b>

### LIABILITIES

<b>NET ASSETS</b>	<b>6,462,889</b>
Without donor restriction	6,908,693
With donor restrictions	326,306
<b>TOTAL NET ASSETS</b>	<b>7,234,999</b>



# \$31,916,533

## 2021-2022 FISCAL YEAR BUDGET



# HOME FOR LIFE

## NAMING OPPORTUNITIES STILL AVAILABLE

You can leave a lasting legacy and further our mission by pledging your support to our capital campaign. We have several remaining options for you to help us realize our dream of a permanent home for Lifehouse. Below is a comprehensive list of naming opportunities that are available. These opportunities allow you to attach a corporate name, your name, or that of a special person in your life, to a designated space in the new Lifehouse building headquarters.

### Name the Lifehouse Building

This is a tremendous opportunity for a business that wants its name connected with the new Lifehouse building, or a fantastic opportunity to honor someone in the community. Your name will be on a plaque next to the building entrance,

*Total Opportunities: 1; Required contribution: \$2,000,000*



### Name the Elevator

The new elevator assists all clients, staff, volunteers and other visitors, particularly those who have mobility issues and need an accessible way to reach the building's second and third floors.

*Total Opportunities: 1; Required Contribution: \$200,000*

### Name the Reception Area

This space is located on the main floor when you exit the elevator on the second floor.

The reception area includes the Office Manager station and a small seating area.

*Total Opportunities: 1;  
Required Contribution: \$150,000*



### Name a Lavender Focus Room

The two lavender focus rooms are located on the second floor. This focus room provides a space that allows staff to touch down and relax or to work in a more private setting.

*Total Opportunities: 2; Required Contribution: \$100,000*



# NAMED OPPORTUNITIES

## **Dennis & Susan Gilardi Garden Terrace**

This space is located outside the second floor of the building. There are both shaded and sun-filled areas with a landscaped garden, as well as tables and chairs for visitors to eat lunch, socialize and, enjoy the outdoors. This area also serves as an informal gathering place for staff, and as a setting for small receptions and other special events.

## **Meredith T Lloyd Conference Room**

The medium conference room is utilized for meetings with caregivers and staff as they discuss strategic care.

## **Uesugi & Associates Architects Lobby**

One seldom forgets their first impression of a place and this is where we will begin to shape that image for visitors to Lifehouse. All visitors to Lifehouse will pass through this lobby. The lobby provides elevator access to the main offices.

## **Kit Andersen Board Room**

This Board Room is located on the second floor and will be utilized for board meetings, committee meetings and special seminars for board members. The board room is equipped with high-tech systems to facilitate video conferencing and communication with outside collaborators.

## **Jane Klebanoff Cohen Training Room**

The Training Room, located on the third floor, is used for weekly staff trainings and to partner with other organizations, for trainings. The Training Room is equipped with high-tech systems to facilitate a variety of trainings.

## **Marcia & Gary Nelson Family Cafe**

The cafe welcomes staff, visiting clients, families and committee members to utilize the space for meals, socialization and holding group celebrations.

## **Jacque Gribens Room**

This primary focus room provides a space that allows staff to touch down and relax or to work in a more private setting.

## **DONOR WALL**

The Donor Wall is prominently placed in the lobby. All campaign donors are listed. Major donors profiles are included.

## **DETAILS OF DONOR RECOGNITION**

Naming privileges are reserved on a first come, first served basis. Your gift to Lifehouse's HOME FOR LIFE will be publicly acknowledged in accordance with our donor recognition plan unless you request anonymity.

Upon receipt of your pledge or gift with a naming opportunity request, Lifehouse will provide a written donor recognition memorandum to capture the recognition and naming details.