



# Moments, Memories, and Music

## 2021 ANNUAL REPORT



Hospice Foundation of Arizona



Southern California Hospice Foundation





## WE ALL HAVE AN INNER LIGHT. BUT AIMEE'S LIGHT SHINES BRIGHT.

In her early 30's, Aimee was diagnosed with Huntington's Disease, a rare, progressive, and deadly disorder causing involuntary movement, cognitive decline, and psychiatric symptoms. As a hereditary condition, Aimee's mother had suffered and ultimately succumbed to this devastating disease. Today, even though Aimee is chair-bound and has difficulty speaking, her inner strength touches and inspires all who know her.

Aimee is now 46 years old and facing the final stage of her life. With the love and care provided by her devoted father, David, and stepmother, Jeannie, we wanted to find a way to celebrate Aimee's passion and life experiences. We were honored to work with the family to assist them in creating a memory book capturing Aimee's life journey. Through the sponsorship of our generous donors, we were able to complete a

three-volume treasured gift for her family.

Beyond that, Aimee had one final wish. Prior to becoming ill, Aimee was an avid concertgoer and she loved to attend them with her brother and many friends. In fact, she attended so many concerts that one family member was inspired to create a quilt from all her concert t-shirts.

Because of the fragility of Aimee's condition, her doctor would not allow her to travel from her home in Mission Viejo, CA. However, we made every attempt to reach out to her favorite band to request a video message for Aimee and we were thrilled when they responded!

The band, who has requested to remain anonymous, created a personalized shout-out, thanking Aimee for her many years of support. In the video message, one of the band members said, "It's so symbolic in a way. A quilt brings

someone comfort and warmth, and that's what you want to do as a musician and as songwriter with your music. So thank you for all of your years of being with us at our shows and we are thinking of you, Aimee."

Knowing the heartwarming impact that a quilt can have on the quality of life, we have partnered with a nonprofit agency called Quilting for Community, ensuring that many of the patients served through our organization have the opportunity to receive a handmade quilt, sewn together with love. We know that these beautiful gifts will be cherished by the family for years to come, and we are so grateful for the band for their heartfelt response. Most importantly our hearts are filled with gratitude for our time spent with Aimee and her family.

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## LEADERSHIP MESSAGE



Dear Friends,

It's is hard to believe that in a time of great change, with the continued challenges of COVID-19, we have so much to celebrate. In 2021, we met our million-dollar-match, a generous donation from an anonymous donor, who doubled the impact of every contribution to our Heavenly Home Living Legacy Endowment. This brought our Endowment to over \$2 million, and provides the financial footing and flexibility that will allow us to open our doors to the community. The Endowment will provide critical operational support for our resident's care, so that hospice patients in need of 24-hour-care can spend their final days in a home-like setting.

Consistent with our commitment to provide a welcoming environment, we completed the furnishing of the Heavenly Home with care and attention to both form and function for our patients and their loved ones. Because of people like you, the Heavenly Home is not burdened by debt—from the purchase of the home to the full renovation, lush landscaping and well-appointed furnishings. Together we have created a beautiful and sustainable property that will serve the Southern California community for decades to come. For all of this we are grateful.

Additionally, we completed and submitted the extensive application to license the Heavenly Home through the California Department of Social Services, ensuring that we meet all state requirements to receive and care for residents. This is a lengthy process, but once we are granted our license, we look forward to opening our doors and serving the many hospice patients who have been seeking the exact type of care the Heavenly Home provides. Until now, no option has existed, and as a result, this has created a vast unacknowledged housing gap for terminally ill patients across our region.

With the opening of the Heavenly Home, we remain steadfast in our commitment to meeting a wide range of socio-economic needs of hospice patients and their families. Through our Angel Assistance program, we continue to provide groceries and pay utility bills for families who are in need, while always looking for opportunities to grant fabulous wishes. Through We Honor Vets, a program that honors terminally ill veterans for their dedicated and selfless service to our nation, we continue to salute our soldiers. And through Community Outreach, which has included a food pantry and PPE distribution, bereavement workshops, and speaking engagements to share the special message of hospice, we continue to serve the needs of those affected by a catastrophic illness.

From the early days of the SoCal Hospice Foundation, all that we do has been made possible through the generous support of our friends and donors. Our greatest dreams and wishes for our patients have been answered through your commitment and partnership. We look forward 2022 with the same trust and big hopes for the terminally ill patients we serve. Around every corner, we see possibility and light.

With Deepest Appreciation,

A handwritten signature in blue ink, appearing to read "Michael A. Uranga".

Michael A. Uranga  
Board President

A handwritten signature in blue ink, appearing to read "Michelle Wulfestieg".

Michelle Wulfestieg  
Executive Director

# JERRY'S HEAVENLY HOME – A SANCTUARY OF HOPE

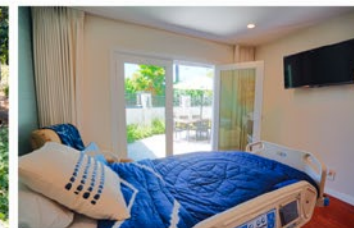
The Heavenly Home is also known as Jerry's Heavenly Home. The Latin meaning of Jerry is "Sacred Name." In Hebrew it means "Chosen by God." We believe that the Heavenly Home will become a sanctuary of hope for all who enter its doors.

As one copes with a terminal illness, the traditional standard of hope for a cure often evolves to hope for comfort, hope for quality of life, and hope for the best care possible...reminding us that no matter where we are in our journey, there is always hope.

The Heavenly Home is Orange County's first and California's third nonprofit end-of-life care facility, dedicated to serving terminally ill patients who would prefer not to die at home; who lack access to care; whose loved ones cannot provide around-the-clock care; or who seek a loving, home-like environment to spend their final weeks of life.

While we look forward to our grand opening in 2022, it is important to also recognize our many achievements. Here are just a few of our Heavenly Home Highlights from 2021:

- We submitted the Residential Care Facility application for the Heavenly Home to the Department of Social Services and were granted a hospice waiver for 6 bed-bound hospice patients from the Orange County Fire Authority.
- Procured 9,421 items of PPE needed for licensing the Heavenly Home including face masks, KN95 Masks, face shields, isolation gowns, hand sanitizer, and gloves.
- We were granted property tax exemption for the Heavenly Home, ensuring that more funds will be used to further our mission.
- We achieved our One Million dollar match, bringing our endowment total to over 2 Million dollars, ensuring that no patient dies alone.





## PATIENT HIGHLIGHTS

Providing patients with love, dignity and support is at the core of our mission. Each day we strive to bring them comfort, whether it be spiritual, emotional or physical, and each day we are touched by their stories. Through our Angel Assistance Program, 56 patients were served throughout Southern California and 14 patients were served through our partner agency, the Hospice Foundation of Arizona. Here are just a few of their stories:

### JOSE

Jose lives in a small, one-bedroom apartment with his wife of over forty years, Irma. Jose is receiving hospice due to heart disease. He also had a stroke several years ago that left him bedbound and dependent on his wife for assistance with daily living. Although Irma is 70 years old and is busy providing the loving care her husband desperately needs, she also continues to work to pay their rent and bills. No one should have to struggle to put food on the table while facing the challenges of losing a loved one, so we were blessed to provide the couple with \$1,000 in grocery gift cards. Your support honors their lives and their love for one another. Thank you.



### BRYANT



Bryant is a delightful 58-year-old gentleman with a positive and uplifting personality. Although he is in chronic pain and suffers a terminal diagnosis from COPD, Bryant welcomes each member of his hospice team with a bright smile and encouragement. To help Bryant breathe, temperature regulation is essential. However, Bryant could not afford the basic items he needs to reduce the summer heat in his home. We were thrilled to be able to help Bryant by providing him with blackout curtains, curtain rods, a floor fan and an air purifier.



### DELORES



Delores is a friendly and outgoing 100 year-old woman who embraces life with spirited enthusiasm. She is confined to a chair due to her illness, but she is very sharp and loves to keep her mind busy. Delores will be the first to tell you that she is an avid reader and loves to do puzzles. Thanks to your kindness, we were able to provide her with a list of books as well as four jigsaw puzzles. Her smile says it all!

### FREDRICK

Frederick was homeless and terminally ill when the mother of his children passed away. His children, ages 15 and 18, were moved into foster care because they had no one to care for them. Frederick, who is only 57, was ultimately able to move into a skilled nursing facility, where he is now receiving hospice.

But his greatest concern was his inability to see his children. Frederick's skilled nursing facility was a long drive from his children, and with his health failing and without a car or the financial resources to be able to afford transportation, his children were left grieving both parents alone. Thanks to your generosity, we were able to provide Uber gift cards that have allowed Frederick and his children to reconnect and make memories together in his final weeks of life.





# COMMUNITY OUTREACH

## MEALS PROVIDED



- Because of the kindness of the community we procured and distributed 241 meals through partnerships with churches, nonprofits and corporations to hospice patients and their families throughout Southern California.

## SPEAKING ENGAGEMENTS

- We conducted 9 virtual and in-person speaking engagements at hospitals, a Chamber of Commerce, nonprofit organizations and associations in order to educate the community about the benefits of hospice.

## COMMUNITY ACCOLADES:



Our Executive Director, **Michelle Wulfestieg** received the Inspiring Leader Award from Leadership Tomorrow, A non-profit organization of Costa Mesa, Irvine, Newport Beach and Tustin dedicated to developing and empowering effective community Leaders.



**Saachi Pavani**, our volunteer was honored at National Philanthropy Day for the Outstanding Youth Award for her extraordinary dedication to serving the patients of Southern California Hospice Foundation through the pandemic.

## ANDREA MONI AND THE ORANGE COUNTY CENTER FOR CONTEMPORARY ART

Throughout May, the Orange County Center for Contemporary Art in Santa Ana hosted the special exhibit, "Collaborate, Create, and Heal," which featured global art phenomenon, **Andrea Moni's** grand-scale multimedia paintings. Included in the exhibit was the big reveal of a painting that Moni created in collaboration with the painting's subject, our SoCal Hospice Foundation Executive Director Michelle Wulfestieg.

Moni is donating the proceeds from the sale of this painting to the SoCal Hospice Foundation and has already donated a gorgeous ocean landscape to our Heavenly Home. Please contact us if you are interested in viewing the piece.







## 14TH ANNUAL HOSPICE GOLF TOURNAMENT - LIFE. LINKS. LOVE.

Every year, we gather at Pelican Hill to tee up, raise funds for our vital programs, and celebrate life together. While we could not gather in person this year due to Covid-19, we held a remarkable virtual golf tournament and silent auction throughout March. Golfers were invited to participate by playing at a course of their choice and sending in their score.

This is traditionally our biggest fundraiser of the year, and thanks to your incredible support, we netted nearly \$55,000. A huge congratulations to the AMAZING foursome winners: John Hornburg, Treb Heining, Bill Goring and Travis Physioc. Each of them has been supporters of the SoCal Hospice Foundation for many years and we are incredibly grateful for their unwavering commitment to our cause!

## 4TH ANNUAL PRESERVING DIGNITY - ONLINE COLLABORATIVE EVENT

SoCal Hospice Foundation partnered with the Orange County Community Foundation (OCCF) to host Preserving Dignity, a collaborative 24-hour Giving Day on July 14 to generate support for nonprofits serving Orange County's older adults in need. Southern California Hospice Foundation had 63 donors who helped raise \$263,040 to support the Heavenly Home Project, slated to become Orange County's first nonprofit end-of-life care home. In total, OCCF's Giving Day raised \$389,684.

In Orange County, there are more than 450,000 adults aged 65 and older, which accounts for 14.3% of the population. By 2045, this number is projected to increase to 17.3%. According to the Orange County Strategic Plan for Aging, adults will face a new set of economic, social, health, and lifestyle challenges associated with aging, and Orange County is not able to provide adequate support of this growing population.

We would like to give special thanks to a member of our Hospice Advisory Council and the founder of our Hospice Guild, Vana Surmanian, and her husband, Michael, for their generous donation of time, talent and treasure. Their continued support has played a significant role in helping us bring the Heavenly Home to fruition.



Additionally, we want to give a big thank you to Fairhaven and Rose Hills Memorial Park for donating a \$25,000 check during our Preserving Dignity campaign. By building a \$2 million Endowment, we will be able to



cover a portion of Heavenly Home's operating costs, allowing greater access to care for our community. We are so thankful to have partners like Dignity Memorial who continue to support our programs and patients in such a meaningful way.

In addition to SoCal Hospice Foundation, other participating organizations – all of which offer a range of supportive services – included Alzheimer's Orange County, Council on Aging – Southern California, Human Options, Inc., Meals on Wheels Orange County, SoulRapha, and St. Francis Home of the Franciscan Missionary Sister of the I C Inc.

# ANNUAL FUNDRAISERS

## 12TH ANNUAL WINE EVENT - HARVESTING HOPE THROUGH THE HEAVENLY HOME

We had a terrific turnout at our Harvesting Hope Event on October 16th! Fifty-five of our supporters joined us in the backyard garden of our Heavenly Home for delicious food and wine, tuneful Spanish guitar, and joyful conversation. We loved spending time with every one of you—it felt like being with family! Thank you also for your sponsorship, silent auction participation, and continued generous support of our mission to make every moment matter for hospice patients. In total, we netted over \$60,000, all of which was matched, dollar for dollar, and designated toward the Heavenly Home Endowment.

This celebration, our first in-person event since the beginning of the pandemic, was a milestone for our Foundation and a testament to all we continue to work toward together. We were able to celebrate the purchase of the Heavenly Home, its renovation, full furnishing, and the progress made on building our Endowment—thank you for helping us to take so many big steps forward!



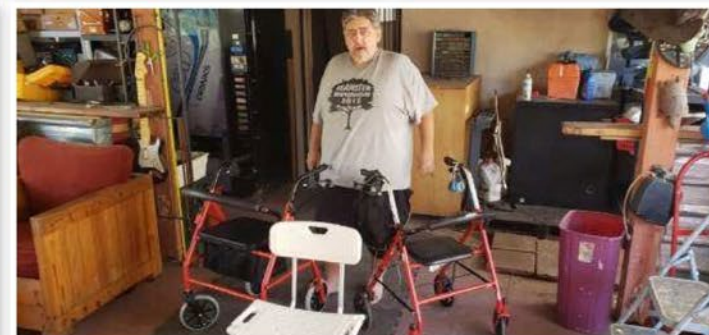


# THE IMPACT OF YOUR SUPPORT





# THE IMPACT OF YOUR SUPPORT





## **We encourage people to share their time, talent or treasure and there are a number of ways to help:**

Become a certified hospice volunteer and provide companionship and emotional support for those facing the end of life.

Join our Advisory Council and provide leadership expertise.

Join the Helping Hands Hospice Guild, an all-volunteer group that supports the work of our organization through special projects.

Assist with our fundraising efforts by becoming a corporate sponsor, donating a silent auction or raffle item, or sitting on an event committee.

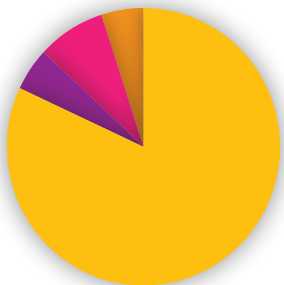
Give a gift in memory of a loved one or honor someone special by remembering them on an important day - birthday, anniversary, graduation, wedding, or other significant holiday.

Engage your company to support the mission of SCHF by establishing a matching gift program, hosting a special fundraising event, or providing in-kind services or products.

Join our Legacy Society by remembering the Southern California Hospice Foundation in your estate planning.

Donate to our Heavenly Home Endowment to launch and support Orange County's first and only nonprofit end-of-life care facility.

# FINANCIAL HIGHLIGHTS



## PUBLIC SUPPORT AND REVENUE

Heavenly Home	\$1,158,590.00	83%
Wine Soiree - Net *	\$63,650.00	5%
Cash Contributions	\$106,770.00	8%
Grants & Other Income	\$62,934.00	5%
<b>Total Income</b>	<b>\$1,391,944.00</b>	<b>100%</b>

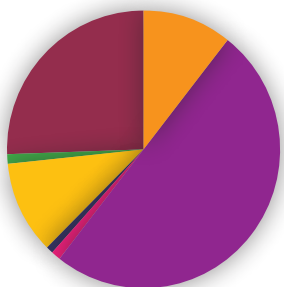
\*Matched for the Heavenly Home Project endowment.



## EXPENSES

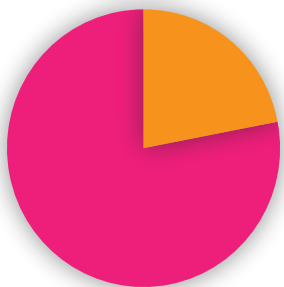
Heavenly Home	\$93,857.00	43%
Patient Assistance	\$51,037.00	23%
Community Outreach	\$32,085.00	15%
We Honor Vets	\$3,209.00	1%
Operations, net of investment income	\$17,811.00	8%
Fundraising	\$21,178.00	10%
<b>Total Expenses:</b>	<b>\$219,177.00</b>	<b>100%</b>

## STATEMENT OF FINANCIAL POSITION



## ASSETS

Investments	\$479,122.00	11%
Cash With Donor Restrictions for Heavenly Home Project Endowment	\$2,212,823.00	51%
Cash With Donor Restrictions for Heavenly Home Project	\$16,712.00	0%
Cash and Investments With Donor Restrictions for Hospice Foundation of AZ	\$26,135.00	1%
Cash & Cash Equivalents	\$474,374.00	11%
Other Assets	\$6,600.00	0%
Fixed Assets - Heavenly Home	\$1,108,151.00	26%
<b>Total Assets</b>	<b>\$4,323,917.00</b>	<b>100%</b>



## TOTAL NET ASSETS

Net Assets - without donor restrictions	\$947,176.00	22%
Net Assets- with donor restrictions	\$3,363,821.00	78%
<b>Total Liabilities &amp; Equity</b>	<b>\$4,323,917.00</b>	<b>100%</b>



# BOARD OF DIRECTORS AND HOSPICE ADVISORY COUNCIL

## BOARD OF DIRECTORS

**Michael Uranga** – SCHF Board President  
Post Acute Continuum, Inc., President

**Shaun Moss, RN** – Board Secretary/Treasurer –  
Companion Home Health & Hospice,  
Chief Operating Officer

**Jim Denver** – First Republic Bank,  
Managing Director

**Matt Didier** – CBRE, Office Properties,  
Senior Vice President

**Alfonso Galvez** – TDW Risk Management  
Associates, Principal

**Sandy Sligar** – SMS Fabrications, Inc.,  
Vice President

## HOSPICE ADVISORY COUNCIL

The purpose of the Hospice Advisory Council is to increase awareness of hospice, educate the community about hospice, and provide a dignified environment to those at the end of life through the Heavenly Home Project.

**Bruce A. Lazenby**, Chairman of HAC - Rose Hills  
Memorial Park and Mortuary

**Christina Alexander, M.B.A. C.F.P.** Philanthropist,  
Hospice Advocate

**Carissa Bechtloff M.B.A.** - City of Hope, Orange  
County

**Linda Barnard** – End of Life Doula,  
Nurse Practitioner (Retired)

**Melissa Dean** - Philanthropist

**Rhonda L. Ducote** - Apriem Advisors

**John Hornburg** - Philanthropist

**Sue Kelly, RN** - Hoag Hospital

**Steve Lazarian** - CityWorks Management

**Scott Schultz** - RH Morris Insurance and Financial

**Vana Surmanian** - Philanthropist

**Deborah Veady** - Philanthropist

**Kay Walker** - Attorney at Law

**Mike Wolfgang** - EOS Worldwide



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