



**Serving with Courage,
Compassion, and Purpose**



Introduction

WelbeHealth is a physician-led public benefit company transforming how care is delivered to vulnerable seniors and their families.

Before her stroke, Caitlyn was a writer who loved words and storytelling. Writing helped her express herself and connect with the world around her.

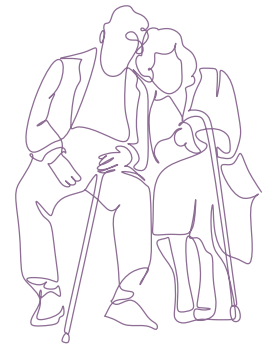
After suffering a stroke, Caitlyn lost the ability to speak and move easily. For months, she was unresponsive and had long hospital stays. Her family did not know what the future would hold. That is when her family found WelbeHealth.

When Caitlyn joined WelbeHealth, she was unable to sit up, stand, or walk on her own. Caitlyn's interdisciplinary care team began working with her step by step to rebuild strength and independence. Physical and occupational therapists focused on balance, mobility, and everyday movement. Caitlyn's family was a big part of her recovery, coming to therapy sessions and making changes at home to help her.

Over time, Caitlyn made amazing progress. She learned to walk again, climb stairs with little help, and do daily tasks like getting dressed and getting in and out of the car. Her speech is also improving, thanks to her hard work and determination.

Caitlyn's daughter, Kimberly, shared her gratitude for WelbeHealth's support, noting that the team encouraged her mother at the right pace and provided a true community of care. Caitlyn described her care team as "wonderful," and her therapists celebrate her progress as a powerful success story.

Today, Caitlyn's story shows how much can be achieved with the right care and support. With help from WelbeHealth and her family, Caitlyn has gained back her independence and hope. Her story is a reminder that recovery is possible, and that compassionate, coordinated care can change lives, one step at a time.



In 2022, WelbeHealth became a public benefit company to formalize its deep commitment to balancing profit with purpose. This ensures that every decision advances the well-being of seniors, their families, and their communities.

Our **first Public Benefit Company report** was foundational and built upon the company's enduring mission and values. It established our baseline and documented our mission, values, and the core social and clinical impact of our care model.

Our **second report** builds upon that foundation. It captures the true outcomes of our work and the ways WelbeHealth continues to set a high standard for the **Program of All-Inclusive Care for the Elderly (PACE)** model of care in participant experience and clinical excellence.

At WelbeHealth, our purpose is simple and profound: to unlock the full potential of our most vulnerable seniors. Every day, our teams make that possible. This report demonstrates how that purpose continues to grow in reach, depth, and measurable community impact.

Our Mission

WelbeHealth's mission is to serve the most vulnerable seniors with better quality and compassion.

We carry out this mission through PACE, a model that provides integrated medical, social, and home-based services enabling seniors to remain in their homes and communities, connected to the people and places they love.

What distinguishes WelbeHealth is how we expand upon the PACE model. We combine evidence-based medicine, person-centered innovation, and advanced technology to achieve high quality care for the seniors we serve.



Core Values

Everything at WelbeHealth is grounded in our mission and core values.

Courage to Love

We prioritize human connection and value every precious life we touch.

Pioneering Spirit

We relentlessly pursue resourceful solutions to support participant health and independence.

Shared Intention

We work as a team with a common purpose.



These values shape everything we do, from care delivery to culture, and reinforce our focus on diversity, equity, and inclusion as catalysts for health, belonging and opportunity.

Our Impact: Advancing Health, Dignity, and Communityⁱ

Quality of Care

Our metrics move beyond process measures to **outcome-based measures** that reflect the real impact WelbeHealth has on participants' health and quality of life. We measure not just what care is provided, but what difference that care makes. This focus is what distinguishes WelbeHealth in the national PACE landscape.

“WelbeHealth put me on these diabetic meals, and I was able to reduce my weight by 100 pounds. My A1C came down to 6.5.”
—**Bill, WelbeHealth Participant**



Quality Metrics

90%

of WelbeHealth participants indicated in 2025 that WelbeHealth improved or maintained their quality of life

85%

WelbeHealth participants spent 85% of their final six months of life at home and out of the hospital or skilled nursing facility

Measuring the last six months of life that participants spend in their home, and out of the hospital or a nursing home, is a powerful reflection of WelbeHealth delivering on the PACE promise: to support frail seniors to live with dignity, autonomy, and connection in their own homes for as long as possible. Nicole N. shared her family's experience with WelbeHealth, saying:

“I moved my mom to Modesto from Phoenix, Arizona, just over a year ago. [WelbeHealth's] Outreach Coordinator was instrumental in getting my mom on board with [WelbeHealth] as soon as my mom was in Modesto. She was nothing short of amazing in representing WelbeHealth, leading with care and compassion, and was present in all of our conversations. When I was aware that my mom could no longer bathe herself, I contacted [WelbeHealth's] Home Care Coordinator. She and her team were so great with my mom. I could rest assured that they would visit my mom at her residential care home and that all of the home care team would treat my mom with dignity and attention. Before my mom passed, [WelbeHealth's] Primary Care Physician never wavered in her care for my mom or became agitated with me. He remained professional, knowledgeable, and responsive. Until the very end he was there, a phone call away, a visit away, and a voice of reason when I no longer could help my mom. All in all, I am simply amazed with my mom's entire team! I will never ever forget any one of them and how they showed up for my mom. Every time.”

77%

of WelbeHealth participants maintained or improved their social connection after joining WelbeHealth

WelbeHealth has made meaningful progress in addressing social connection, purpose, and mental well-being.

Community Engagement

WelbeHealth has evolved its community engagement programs to reach more seniors while improving the quality and consistency of our outreach.

WelbeHealth metrics reflect not only broader reach but deeper, sustained community partnerships.

Community Engagement Metrics

2,686

Number of seniors supported in completing and submitting Medi-Cal applications between January 2025 and March 2026. As a result, 1,329 seniors were enrolled in Medi-Cal.

19

Number of education sessions to ~1,900 seniors. WelbeHealth has equipped seniors and families with knowledge about aging, prevention and long-term care options.

7

Number of health monitoring events to ~600 seniors. WelbeHealth has provided free screenings and wellness checks to foster preventive health giving seniors early and impactful information about their health to make early interventions.

~5,000

Number of meals to seniors in our communities. WelbeHealth provides nutritious meals at center-based community events, supporting seniors' health, connection and well-being.

These initiatives go beyond traditional outreach. They address the social determinants of health, strengthen community trust, and extend WelbeHealth's mission well beyond the walls of our centers.

Our People: The Heart of WelbeHealth

Our team members are the foundation of our success. From clinicians to drivers to care coordinators to technology developers, each team member shares a commitment to serve with compassion and integrity and plays a vital role in helping seniors live independently and joyfully. Jeff Ji, Executive Director of WelbeHealth's Rosemead center, shared the following story about a local participant's journey:

When one of our participants first enrolled with WelbeHealth, he was living alone with limited support and significant barriers to care. Without a cell phone, WelbeHealth team members could only reach him through in-person mobile visits. Early on, it became clear that he was experiencing cognitive challenges and was hesitant to accept help—an understandable response for someone navigating increasing vulnerability while trying to maintain independence.

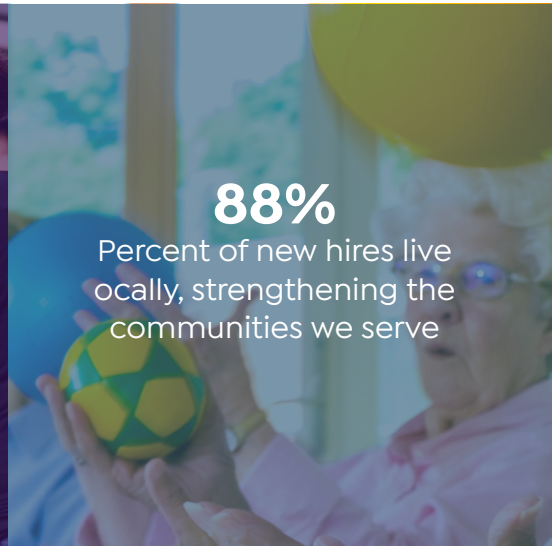
What followed was a powerful example of what Courage to Love and Pioneering Spirit can achieve. Through close partnership between WelbeHealth social work, VA social work, and property management, the team quickly recognized that the participant was no longer safe in his independent living environment. Our social worker connected with the participant's out-of-state daughters, ensuring they were informed, supported, and involved in every step of the way. In parallel, we worked with the VA social worker to clarify the participant's decision-making capacity and initiate a Durable Power of Attorney. Together, the team and family made the difficult but necessary decision to pursue assisted living placement—prioritizing safety, dignity, and quality of life.

The transformation that followed was deeply moving. At his first on-site visit to WelbeHealth Center, the participant looked brighter and healthier than he had in months. He was well groomed, well fed, smiling, and joking with staff. He spoke openly about his new living situation, shared gratitude for the meals and care he was receiving and expressed excitement about joining Day Center activities. In his own words, **“I'm excited to see what this next phase of life will bring.”**



A Supportive, Team-Oriented Work Environment

We prioritize our employees' well-being and foster a culture of collaboration, inclusivity, and respect.



1,841

Number of new jobs WelbeHealth has created in 13 communities across California

88%

Percent of new hires live locally, strengthening the communities we serve



72%

Percent of team members who are women, and 67% of leaders identify as female, demonstrating gender equity in action



18%

Percent of team members who participate in a business resource group, self-organized team members groups that provide inclusion within and business impact to WelbeHealth



42%

Percent of our leadership who identify as a person of color



90%

Percent team members who participate in our 401(k) program, supported by a company match, showing our commitment to long-term stability



17%

Percent of our open roles were filled by internal candidates, reflecting the continuous career growth among our people

Looking To the Future

As WelbeHealth looks ahead, we remain steadfast in our mission to expand access to high-quality, compassionate care, and to lead the evolution of the PACE model nationally. Building on the foundation of our first public benefit report, we seek in our next chapter to deliver measurable outcomes across three overarching priorities:

1. Deliver Unmatched Care and Team Experiences

We aim to redefine what excellence in PACE care means. Our focus is on PACE care model distinction, ensuring that every participant feels seen, respected and cared for. We will seek to strengthen the participants' experience through personalized, coordinated care and innovative health programs that address dementia, diabetes, substance use, and other complex conditions.

Equally, we will continue to invest in our people. We will create clear, inspiring career journeys and develop the best place to grow a mission-driven career. Through potential advanced learning platforms, academic partnerships, and continuous development, we will aim to ensure that every team member has the tools, training and sense of purpose to thrive.

2. Lead Innovation in the PACE Model and Clinical Delivery

WelbeHealth is striving to set a new standard for how PACE is delivered by integrating data, technology, and human connections to create seamless, coordinated experiences for participants and team members alike.

We are also looking to advance new digital tools to make care more accessible, transparent and responsive.

3. Expand Access for Vulnerable Seniors

WelbeHealth will also champion national policies that protect and expand PACE, advocating for every eligible senior in America to have the opportunity to live independently with dignity and support. Through this national and state expansion, we hope that the most vulnerable older adults, regardless of income or geography, have access to the best care available.

These goals represent the next evolution of what it means to deliver compassionate, equitable and world-class care to seniors.

Innovation and Leadership in PACE

Three of our centers were honored by the National PACE Association for their commitment, leadership and innovation in embedding diversity, equity, and inclusion within daily operations and in the communities we serve.

We also believe in professional and career growth. Our programs include leadership development programs such as our Emerging Leader Programs and Effective Manager Coaching, dedicated leadership training, as well as broad-based team member programs often sponsored by our Business Resource Groups.

WelbeHealth continues to redefine what is possible in the PACE model. By integrating digital health tools, predictive analytics and real-time care coordination, we are expanding the reach and effectiveness of person-centered care.

Our model leverages technology to bridge gaps in access, reduce loneliness and optimize care delivery—setting new benchmarks for the industry.

WelbeHealth is proud to have earned Level 2 recognition from the Institute for Healthcare Improvement (IHI) as an Age-Friendly Health System for our first seven PACE centers. This highlights our ongoing commitment to providing exceptional, age-friendly care to our senior participants.

Achieving Level 2 recognition means that our centers have successfully integrated the “4Ms” framework—What Matters (to older adults), Medication, Mentation, and Mobility—into our care practices, ensuring that our participants receive the highest quality of care that is personalized to their needs.

WelbeHealth is one of only 16 PACE organizations nationwide to earn Level 2 status.



In Closing

Our first public benefit company report laid the foundation.

This second report shows how far we have come and how much further we can go.

WelbeHealth's growth represents more than scale; it represents deepening impact, measurable outcomes, and leadership in reimagining what care for vulnerable seniors can be.

We are proud to serve as a model for compassionate, innovative, and community-rooted care. This fulfills our purpose to help every senior live with joy, dignity, and independence.

Date of Report: June 2026

