



ELDERHELP



2010 Annual Report

Our Mission and Values

MISSION

ElderHelp provides personalized services and information that help seniors remain independent and live with dignity in their own homes.

VALUES

Compassion

We are supportive, caring, and empathetic--we strengthen lives.

Integrity

We do the right thing even when no one is looking, we remain focused on those we serve, and are trustworthy and honest.

Community

We passionately pursue our mission, emphasize collaboration, strive for productive communication, and seek to cultivate goodwill.

Accountability

To our mission and stakeholders, we are dependable and responsible. We are fiscally sound, and will be sustainable for generations to come.

Respect

We honor the process of aging; we listen and acknowledge others' ideas, are considerate, and value diversity.

Excellence

We strive for quality in all we do; we are responsive, innovative and efficient.

An ElderHelp Welcome

Dear Supporters:

Throughout 2010, the ElderHelp Board and staff have focused on maintaining the agency's financial health while growing our capacity to help more low income seniors remain independent at home. Having implemented a strong economic survival plan in 2009, we set our sights on securing funding for the new ElderHelp Community Center which is slated to open in North Park in January 2012. We were able to secure enough funds for tenant improvements and will initiate a capital campaign in the coming months to raise the necessary funds to furnish the new building.

In addition, ElderHelp increased our capacity to advocate for home and community based services as we built better relationships with public policy leaders on a local and statewide level. In 2011 we hope to expand this advocacy to the federal level to encourage more funding for home and community based services for low income seniors.

ElderHelp also continued to grow our award winning programs and services and recruited a record number of volunteers. This growth has allowed us to serve more seniors and increase the levels of services to our existing members and clients.

In addition to these great advances in our programs, ElderHelp also developed a variety of new revenue sources in addition to fundraising. These included membership fees and also reimbursement through partnerships with government agencies. These revenue streams may take awhile to develop, but the groundwork and systems are in place to grow these areas of funding.

The population boom of seniors is just starting to take shape and we are seeing more and more evidence that living a long healthy life is expensive especially with long term care costs on the rise. With this shift in society, Elderhelp could not be more vital and important to the community. We want to thank you all for the support that you have given this organization and look forward to a dynamic and impactful 2011.

Sincerely,



Leane Marchese
Executive Director



Karen Walker
Board President



Leane Marchese
Executive Director



Karen Walker
Board President

The Concierge Club



The Concierge Club provides seniors with essential services that enhance health, independence and quality of life. ElderHelp's Member Care Coordinators are the key to Concierge Club services. They are trained, geriatric social workers who work with members to develop individualized care plans. They maintain regular contact with members to provide them with a variety of services and assistance to help them remain in their own homes. The Concierge Club was mentioned as one of California's Top Ten Innovative Community Solutions on Aging in a brief published by the California Healthcare Foundation. ElderHelp also presented the Concierge Club at the National Home and Community Based Services Conference in Atlanta in September 2010 as well as the American Society on Aging Conference and the California State Area Agency on Aging conference in November 2010.

HomeShare



HomeShare continues to be a simple, affordable solution that offers great benefits to seniors and those seeking more affordable housing. A senior householder offers accommodation to a seeker in exchange for an agreed upon level of help. Housemates provide in-home services for the seniors in exchange for room and board or pay rent to subsidize the seniors' incomes. In-home services may include cooking, shopping, housekeeping, yard work, transportation, security, and companionship. During our 20 year history of the program we have made over 900 matches. HomeShare provides affordable housing options for these individuals and has the added benefit of furthering ElderHelp's mission by allowing frail elders to remain in their own homes rather than face placement in nursing homes or other institutionalization.

Independence is...



“Being able to continue living in my own home and maintaining the ability to make my own decisions.”

-Roberta G., Age 71, Concierge Club member since 2009

Volunteers



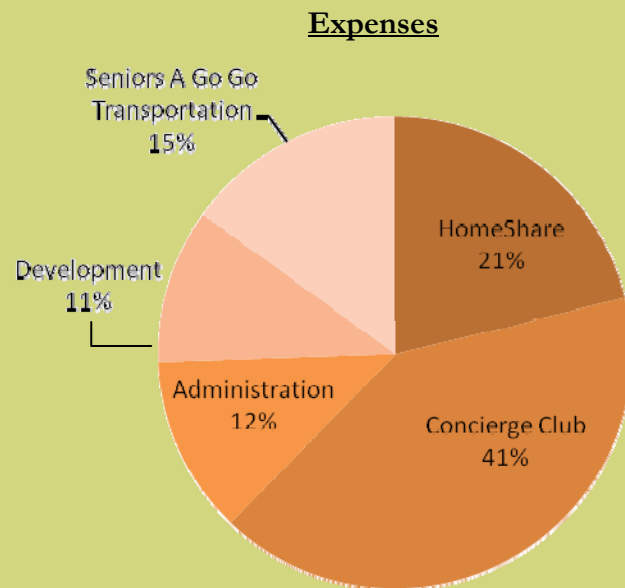
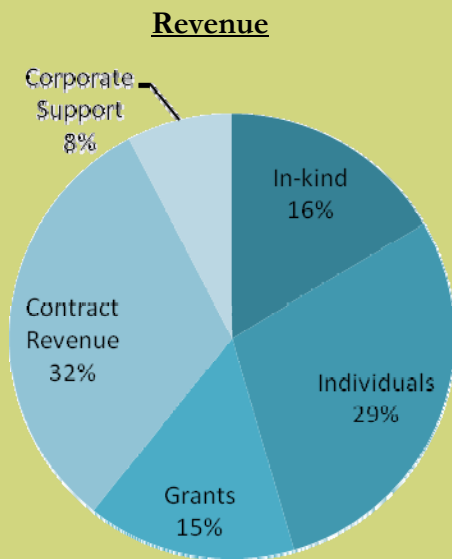
ElderHelp's volunteers, matched to seniors through our Concierge Club, are not only the lifeblood of our program but create a better living environment for seniors by providing a variety of services that historically may have received from family members. Services they provide include transportation, grocery shopping, help with errands, socialization, physical activity, home repair, and health education and prevention. Many times the relationship that develops between a volunteer and senior is akin to a family relationship. Volunteers are recruited from all age groups and ethnic backgrounds throughout the City of San Diego. Currently ElderHelp has nearly 200 volunteers who provide direct one-on-one services to seniors.

Financial Accountability

	2010	2009
Revenue		
In-kind	\$191,079	\$256,807
Individuals	\$333,590	\$351,053
Grants*	\$175,334	\$324,438
Contract Revenue	\$365,240	\$267,494
Corporate Support	\$88,352	\$66,547
Total Income	\$1,153,595	\$1,266,339
Expenses		
HomeShare	\$238,163	\$195,709
Concierge Club**	\$458,689	\$874,324
Administration	\$137,012	\$185,798
Development	\$117,537	\$182,948
Seniors A Go Go Transportation	\$168,328	\$30,337
Total Expense	\$1,119,729	\$1,469,116
Net Income from Operations	\$34,969	-\$202,777
Non-Operating Revenue		
Interest	\$17,186	\$7,283
Gain(Loss) on Investments	\$37,912	-\$64,463
Total	\$152,687	-\$84,916
Net Income	\$187,656	-\$287,693

* **Note:** Grant revenue decrease reflects the end of two specially funded projects, Aging as Ourselves and Wildfire Recovery for Seniors.

** **Note:** Concierge Club expense decrease reflects the end of two specially funded projects, Aging as Ourselves and Wildfire Recovery for Seniors.



The Difference a Dollar Makes

George, a 90-year-old World War II vet was recently widowed. He was lonely living a thousand miles from his only daughter. ElderHelp arranged a weekly visit from a caring volunteer. They play cards, swap stories, and watch classic movies together.

Cost: \$30 per month

Spending time with a caring individual: Priceless

Ann, an 85-year-old retired teacher with severe glaucoma wasn't able to drive to medical appointments or the grocery store. ElderHelp coordinates volunteer drivers to escort her to the doctor and help her with a regular lift to the store and pharmacy. Her volunteer also sees her home safely.

Cost: \$100 per month

Having peace of mind over safe transportation: Priceless



2010 ElderHelp Donors

\$75,000 +

- City of Poway
- Hard Rock Hotel-San Diego
- San Diego Housing Commission
- SANDAG-Transnet

\$50,000 - \$74,999

- Grossmont Healthcare District
- Price Charities

\$20,000 - \$49,999

- AT&T Pacific Bell
- San Diego Foundation
- San Diego Social Venture Partners
- UPS Foundation
- Peri and Peg Urvek

\$10,000 - \$19,000

- County of San Diego
- Datron World Communications, Inc.
- Ellen Browning Scripps Foundation
- Eugene and Joan Foster Fund
- Connie Golden
- Intuit
- Luce, Forward, Hamilton & Scripps LLP
- Sempra Energy Foundation
- The Wells Fargo Foundation

\$5,000 - \$9,999

- Bob Brush
- Change A Life Foundation
- Charles and Ruth Billingsley Foundation
- City of San Diego
- Coughlin Stoia & Robbins
- Dallas Women's Foundation
- The Fieldstone Foundation
- Gary and Mary West Foundation
- J. Reese Construction, Inc
- Maurice J. Masserini Charitable Trust
- The Robert Wood Johnson Foundation
- Stein Family Foundation
- Marie Tuthill
- United Way of San Diego
- Virginia Napierskie

\$1,000 - \$4,999

- Alert Ambulance Network LLC
- Alvarado Hospital
- Barney & Barney LLC
- Bobby and Lisa Basso
- BD Biosciences
- Bell Charitable Foundation

- Bing Crosby's Restaurant & Piano Lounge
- Bradford Renaissance Portraits
- Burnham Foundation
- Cafe-Bar Europa
- California Bank & Trust
- Callaway Vineyard & Winery
- Charles A. Frueauff Foundation, Inc.
- City of La Mesa
- City of Santee
- Clearview Eye & Laser Medical Center
- Yale and Judy Combs
- Community Service Association
- Maida Cooper
- Tex Cornwell
- Cush Automotive Foundation
- Laura Dries
- Charles C. Edwards
- Epstein, Grinnell & Howell
- Danah Fayman
- Audrey Geisel
- Hash House A Go Go
- Heritage Senior Care, Inc.
- Bob and Alice Hoch
- Helen Hodges
- Howards Rug
- Island Prime
- Jones Day
- Judith Wenker
- Kaiser Permanente
- La Serenissima Vineyards & Winery
- Lori Watkins Art
- Michael-David Winery
- Kay Miller
- Mission Home Health
- National Philanthropic Trust
- Nonprofit Management Solutions
- North Park Lion's Club
- Northrop Grumman
- Cynthia Olmstead
- Pillsbury LLP
- Pratt Memorial Fund
- Robert Price
- PRP Wine International
- Qualcomm Inc.
- Gerald and Christa Reynolds
- Ross, Dixon & Bell
- Rowley Portraiture
- Royal India Exquisite Restaurant
- Saigon on Fifth
- San Diego Medical Services Enterprise

- San Francisco Consumer Action, Inc
- Neal and Margaret Schmale
- Carla Schmidt
- Stacey Schmolke
- Silver Oak & Twomey Cellars
- Smithfield Trust Company
- Soroptimist International of La Mesa
- TangoAlma Dance Ensemble
- TelecomPioneers
- Tequila Los Abuelos
- The IT Pros
- The Samuel I. & John Henry Fox Foundation
- The Wine Bank
- Richard Tiefenbach
- Trisler's Wine Bar
- Truluck's Seafood Steak & Crab
- Trumer Pils
- US Bank
- Verdant Custom Outdoors
- Vibra Hospital of San Diego
- Viejas Enterprises
- Henry and Barbara Vostmyer
- Wastvedt and Co. Inc
- Waxie Sanitary Supply, Inc.
- Keith and Priscilla Webb
- Weingart-Price Fund
- Wells Fargo
- Janet Wornat

\$500 - \$999

- 211 San Diego
- A Better Solution
- Michelle Adams
- American Medical Response
- At Your Home Familycare
- Jeffrey Blodgett
- Mary Louise Boehne
- Boutique Care Management
- Callaway Golf
- Lenore Cantor
- Cask Room
- Laurie Catron
- Amy Chiu
- City National Bank
- Ben Clay
- Comfort Keepers In Home Care
- Continuing Life Communities
- Marie Cruz
- Edie Davis
- Robert Ellis
- Mathew and April Fink
- Gensler
- Harrah's Rincon Casino and Resort

- Harry's Bar & American Grill
- Kathy Haynes & Friends
- Ruth Hayward
- Honest Tea
- Humphrey's By the Bay
- La Jolla Nurses Homecare
- Lightbridge Hospice
- Lions Wines
- Louis Tommasino CPA's
- MADCAPS
- Leane Marchese
- Michael and Laura Martella
- Julie Martindale
- Andrew and Christel May
- Margaret McDaniel
- Kimberly McDonnell
- Michael Ehrenfeld Company
- Christina Miller
- Patrice Mintun
- Patty Moises
- Monsoon Group
- Nobu San Diego
- Oggi's Pizza and Brewing Co
- One Hope Wine
- Pala Band of Mission Indians
- Pablo Palomino
- Roland and Elizabeth Pavlovics
- Piatti Restaurant
- Plymouth Congregational Church
- Point Loma Convalescent
- Poway Health Care
- Redwood Terrace
- Se San Diego
- Donna Sefton
- Walter Seymour
- Sheraton Vancouver
- SPRITES of East County, Inc.
- Sycuan Resort & Casino
- Douglas R. Tribble
- Union Bank
- United Way of Greater Los Angeles
- Urban Solace
- Wakeland Housing & Development
- Karen Walker, CFP
- We Care Home Health
- Virginia Weber
- Westin Gaslamp Quarter Hotel
- Christie and Robert Wright

Because of Donors Like You...

90% of Concierge Club members remained in their homes longer

85% of members accessed services they most likely could not otherwise afford

100% of members were less at risk for elder abuse

100% of ElderHelp services lightened the load for children caring for aging parents



At ElderHelp our purpose is to provide seniors with the assistance they need to remain in their own homes and communities. Their home is more than where they live, it is their life. Take away their home and you take away their individuality, their independence, and eventually their will to live. Because of you, the seniors we serve are where they want to be. Thank you!

Staff

Leane Marchese
Executive Director

Sarah Shepard, CFRE
Associate Executive Director

Cynthia Beisiegel
Transportation Coordinator

Anya Delacruz
Enrollment Supervisor

Monica Gonzales
Information and Referral Specialist

Florence Gray
Volunteer Services Manager

Cynthia Hansen
Lead HomeShare Coordinator

Ana Hernandez-Bravo
Development Coordinator

Angelica Hunter
Member Care Coordinator

Mark Medeiros
Business Manager

Emily Merritt
Member Services Director

Luellen Reese
Accounting Specialist

Robert Shearer
Member Resource Supervisor

Sunita Upchurch
HomeShare Coordinator

Claudia Velasquez
Bilingual Member Care Coordinator

Anneliese Wells
Member Liaison

Board of Directors

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Vice President

Shirley Thomas
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Todd Miller
Treasurer

Emily Gates
Lisa Luiso

Kimberly McDonnell
Amy Nelson

Joe Snyder

Hung Tran

Karen Walker, CFP

Michael Wastvedt, CPA

Virginia Weber

Katie Wiest



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