

## Staff

Leane Marchese  
*Executive Director*

Sarah Shepard, CFRE  
*Associate Executive Director*

Ana Bellini  
*Development Coordinator*

Diedra Brown  
*Administrative Assistant*

Anya Delacruz  
*Member Services Manager*

Shari Dawson  
*Transportation Coordinator*

Monica Gonzales  
*Member Care Coordinator*

Florence Gray  
*Volunteer Services Coordinator*

Cynthia Hansen  
*Lead HomeShare Coordinator*

Angelica Hunter  
*Member Care Coordinator*

Amy Hull  
*Member Liaison*

Carrie McClellan  
*Member Outreach Manager*

Silva Mejia  
*Member Care Coordinator*

Emily Merritt  
*Member Services Director*

Luellen Reese  
*Accounting Specialist*

Robert Shearer  
*Member Resource Supervisor*

Sunita Upchurch  
*HomeShare Coordinator*

Anneliese Wells  
*Volunteer Recruiter*

## Board of Directors

Judith Wenker  
*President*

Todd Miller  
*Vice President*

Shirley Thomas  
*Secretary*

Lisa Luiso  
*Treasurer*

Mathew Fink  
Emily Gates  
Kimberly McDonnell

Amy Nelson  
Brad Pagano  
Joe Snyder  
Katie Wiest



# ELDERHELP



# ELDERHELP

**NORTH PARK** *(Main Office)*  
4069 30<sup>th</sup> Street  
San Diego, CA 92104  
619.284.0214

**POWAY** *(HomeShare Only)*  
Poway Senior Center  
13094 Civic Center  
Poway, CA 92064  
858.748.6252

# 2011 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.

# Because of Donors Like You...

- **4,330** seniors received the help they needed
- **2,126** calls were served by the Information & Referral team this past year
- **2,000** people in need of housing information and referrals were helped by the HomeShare program



- **500** volunteers made an impact in the lives of San Diego seniors
- **242** Concierge Club members were served over the past year
- **50** matches were made by the HomeShare team in 2010/11 serving San Diego and Poway



# 2011 ElderHelp Donors

## An ElderHelp Welcome

### \$75,000 +

- City of Poway
- San Diego Housing Commission
- SANDAG-Transnet

### \$50,000 - \$74,999

- Alliance Healthcare Foundation
- Grossmont Healthcare District
- The San Diego Foundation
- The Scan Foundation

### \$20,000 - \$49,999

- Anonymous
- Bob Brush
- The Parker Foundation
- The May and Stanley Smith Charitable Trust
- Jackie Zitlau

### \$10,000 - \$19,000

- Lucille Alari
- The Bell Charitable Foundation
- The Bravo Foundation
- The Eugene and Joan Foster Fund
- Connie Golden
- The George P. Lauren Foundation
- Virginia Napierskie
- San Diego Social Venture Partners
- The Ellen Browning Scripps Foundation
- UPS Foundation
- Weingart Foundation

### \$5,000 - \$9,999

- Archstone Foundation
- AT&T Foundation
- AT&T Pioneers
- Barnhart-Reese Construction, Inc.
- The Charles and Ruth Billingsley Foundation
- Bradford Renaissance Portraits
- The De Falco Family Foundation
- HD Supply
- Heller Foundation of San Diego
- Intuit
- Maurice J. Masserini Charitable Trust
- Royal India Exquisite Restaurant
- Sempra Energy Foundation

- Silvergate Yacht Club
- Stein Family Foundation
- The Tippet Foundation
- US Bank
- The Wells Fargo Foundation

### \$1,000 - \$4,999

- Michelle Adams
- Barney & Barney LLC
- The Burnham Foundation
- California Bank & Trust
- Carruth Cellars
- Christina Casgar
- Change A Life Foundation
- Chevron Humankind Matching Gift Program
- Chocolat Hillcrest
- City of La Mesa
- City of Santee
- Yale and Judy Combs
- Community Service Association
- James S. Copley Foundation
- Cubic Corp.
- Cushman Foundation
- Paul Davis
- Charles Dexter
- Eclipse Chocolate
- Etching Expressions
- Danah Fayman
- Jeff Floodberg
- Samuel I. & John Henry Fox Foundation

- Audrey Geisel
- Gensler
- The Gold Diggers
- Linda Hanson
- Helen Hodges
- Catherine Ingrassia
- Jones Day
- Kaiser Permanent
- Keepsake Choices
- Andrienne Loder
- Lou & Mickey's
- Luce, Forward, Hamilton & Scripps LLP
- Joe and Lisa Luiso
- Margaret McDaniel
- Kimberly McDonnell
- Michael-David Winery
- Kay Miller
- Paradise Valley Health Care Center
- Pillsbury LLP
- Pinkberry
- Point Loma Convalescent Hospital
- The Pratt Memorial Fund
- Price Charities

- Promise Hospital of San Diego
- Qualcomm Inc.
- Jennifer Ramos
- ResMed Corporation
- Rowley Portraiture
- San Ysidro Health Center
- Neal and Margaret Schmale
- Marsha Starr
- Steven and Karen Sommers
- Soroptimist Int'l of La Mesa
- Stueve Siegel Hanson
- Sullivan Solar Power
- Sycuan Resort and Casino
- Richard Tiefenbach
- Sharon Turner
- Marie Tuthill
- United Way of San Diego County
- Peri and Peg Urvek
- Viejas Enterprises
- Villa Las Palmas
- Village to Village Network
- Wastvedt and Co. Inc.
- Waxie Sanitary Supply, Inc.
- Virginia Weber
- Wells Fargo
- Judith Wenker
- Craig and Carol Whitwer

### \$500 - \$999

- 211 San Diego
- Aladdin Restaurant-Hillcrest
- American Medical Response
- Paul and Alexia Anas
- Arika Anderson-Daniels
- Nicholas Araiza
- AT&T United Way
- Bank of America United Way Campaign
- Allen and Barbara Bellini
- Mona Brehm
- Burlingame Club
- Ann Butterfield
- Callaway Vineyard & Winery
- Casa Guadalajara
- Charitable Auto Resources Inc.
- Cinnabar Winery
- Comfort Keepers In Home Care
- Shelly Page Cooper
- Crossfit San Diego
- Joan Dayton

- East County Senior Service Providers
- Entertaining Green
- ER Ambulance
- Far Niente, Dolce and Nickle & Nickel
- The Finest Food Inc.
- Gordon Biersch Brewery Restaurant
- Har-Bro Construction & Consulting
- Harry's Bar and American Grill
- Ruth Hayward
- Herman Miller Inc
- Island Prime
- Julian Hard Cider
- LA Clippers
- Lemon Grove Rehabilitation
- Marianne Maloney
- Leane Marchese
- Max Care Ambulance
- MERCO
- Michael Ehrenfeld Company
- Casey and Bay Mitchell
- Mohawk
- Monsoon Group
- Murray Mott
- Nika Water
- Nobu San Diego
- One Hope Wine
- Piatti Restaurant
- Plymouth Congregational Church
- PRP Wine International
- RAM Durable Medical Equipment
- Roger and Kristin Rude
- Geraldine Ryan
- Sheraton Vancouver
- Silvergate Bank
- Tyler Struzinski
- Sushi on a Roll
- Tequila Fortaleza
- Trisler's Wine Bar
- United Way CA Capital Region
- United Way of Greater Los Angeles
- Peter Vajda
- Viejas Casino
- Keith and Priscilla Webb
- Ty Webb Design
- Roberta Westdal
- Cheryl Wilson
- Cindy Wilson
- Ydoj Style

Dear Supporters:

During the last year, the ElderHelp Board and staff has focused our energies on remaining financially healthy and on adding staff and volunteers to help more low income seniors remain independent at home. We also continue our efforts to fund and create a senior center in North Park, although recent legislation and court decisions have made sufficient public funding a serious challenge. The center remains one of our priorities but its outcome is unclear at this point. We remain proactive and continue our ElderHelp mission at our temporary location at Fairmont and El Cajon.

ElderHelp also continued to grow its 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. So many of our members depend heavily on us, it is a blessing and an obligation we take very seriously.

In addition, ElderHelp increased its capacity to advocate for home and community based services as we build better relationships with public policy leaders on a local and statewide level. We hope to expand this advocacy to the federal level to encourage more funding for home and community based services for low income seniors, and importantly continues recognition for our "village model" for helping seniors at home.


ElderHelp also continues to expand its revenue sources in addition to traditional fundraising. These included membership fees for those seniors able to pay and also reimbursement through partnerships with government agencies. These revenue streams may take a while to develop, but the groundwork and systems have been put into place.

The population boom of seniors continues to expand; just witness the increasing attention this issue is getting in the media. 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 all that in play, ElderHelp could not be more vital and important to the community. We couldn't do it without your continued support and we look forward to a dynamic and impactful 2012.

Sincerely,



Leane Marchese  
Executive Director



Judith A Wenker  
Board President



Leane Marchese  
Executive Director



Judith Wenker  
Board President

# The Need



The elderly population in San Diego is significant and growing. According to the San Diego Association of Governments (SANDAG), eleven percent (147,000) of the 1.3 million people in the City of San Diego is over the age of 65. This elderly group is expected to double over the next decade while the almost two percent (22,000) of elderly in the 85-plus group will triple.

Financially, many seniors live on fixed and depreciating incomes, have not adequately planned for retirement, and do not have a family and friend safety net to assist with long-term care costs. In fact, thirty-four percent of the entire San Diego county senior population cannot meet their basic needs as measured by the Elder Economic Security Standard Index (Elder Index), an elder and county-specific tool that measures a senior's basic needs. According to the Elder Index, San Diego seniors who have an income of \$1,902 per month (\$22,824 annually) cannot afford the basic necessities of life.

# Who We Impact

## Growing Impact

ElderHelp's commitment to bettering the lives of seniors is not just limited to those who use our services directly. Our Executive Director, Leane Marchese, is out in the communities of Sacramento and San Diego advocating for positive change for all seniors. She also holds leadership positions in state and local organizations that are involved in serving seniors. Our Concierge Club program has become an innovative model that is garnering great attention and we leverage this success to bring attention to improvements that can be made in policies and service delivery.



# Fast Facts

**Year Founded:** 1973

**What we do:** 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.

**Where we do it:** The Concierge Club serves seniors (most over age 75) who are homebound and have one or more chronic health problems and limited social support. ElderHelp provides care management services to low-income seniors living in central San Diego including North Park, City Heights and other inner city neighborhoods. In addition, satellite locations provide services in regions of east San Diego County and the Poway area.

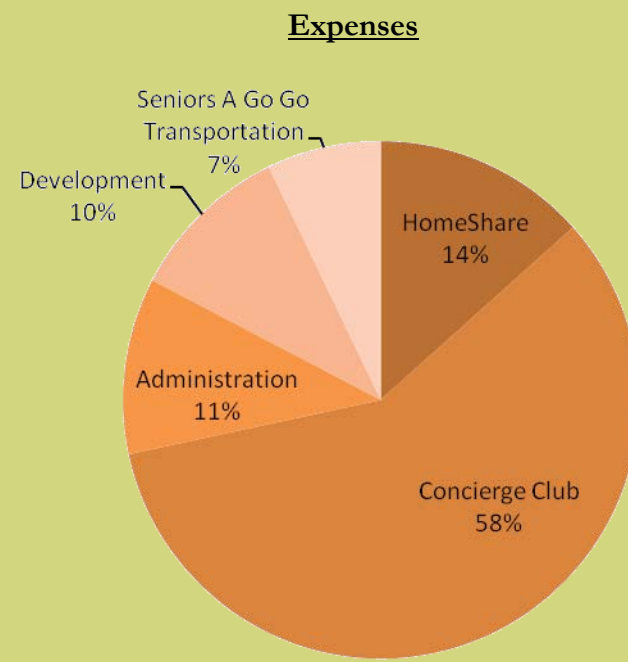
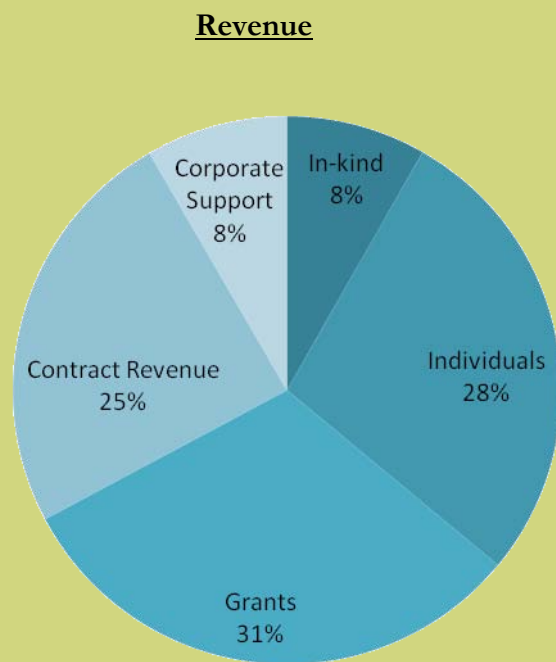
**Recent achievements:** The Concierge Club has received national recognition for its innovation in providing geriatric case management and homecare services at an affordable rate for seniors. Most recently, ElderHelp was featured in a January 2011 article in the U.S. News and World Report, highlighting the Concierge Club as an affordable alternative to private homecare agencies. In 2010, ElderHelp was invited to present at the Home and Community Based Services Association, the American Society on Aging, the California statewide conference for Area Agencies on Aging and at two legislative briefings to share the ideas and concept of the Concierge Club.





# Financial Accountability

	2011	2010
<b>Revenue</b>		
In-kind	\$106,348	\$191,079
Individuals	\$358,155	\$333,590
Grants	\$402,186	\$175,334
Contract Revenue	\$314,939	\$365,240
Corporate Support	\$107,925	\$88,352
<b>Total Income</b>	<b>\$1,289,553</b>	<b>\$1,153,595</b>
<b>Expenses</b>		
HomeShare	\$164,621	\$238,163
Concierge Club	\$715,923	\$458,689
Administration	\$135,562	\$137,012
Development	\$125,279	\$117,537
Seniors A Go Go Transportation	\$87,891	\$168,328
<b>Total Expense</b>	<b>\$1,229,276</b>	<b>\$1,119,729</b>
<b>Net Income from Operations</b>	<b>\$60,277</b>	<b>\$33,866</b>
<b>Non-Operating Revenue/Expenses</b>		
Interest	\$2,175	\$17,186
Gain(Loss) on Investments	\$85,511	\$37,912
Depreciation	\$94,820	\$92,186
Building Renovation	\$8,029	\$5,403
<b>Total</b>	<b>\$190,535</b>	<b>\$152,687</b>
<b>Net Income</b>	<b>\$250,812</b>	<b>\$186,553</b>



# ElderHelp Services

## Concierge Club

ElderHelp has responded to the growing population of seniors with the creation of the Concierge Club. The Concierge Club is an integrated approach that provides comprehensive membership-based wrap-around solutions to address the growing health and social challenges that low and moderate income seniors and their families are facing. The Concierge Club addresses isolation and depression among homebound seniors through personal attention, meaningful social engagement and coordinated programs and services. Concierge Club benefits include high level case management, trusted referrals, grocery shopping, escorted transportation, home safety modifications, minor home repairs, light housekeeping, companionship, and pet care. The Concierge Club membership also provides opportunities to improve physical and mental health through socialization, recreational and fitness activities, and in-home health education and prevention activities -- all provided by volunteer caregivers.



## 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.



# Home is where the Heart Is



ElderHelp's volunteers, Together for over 65 years, Mr. and Mrs. Epstein had outlived their only child, and now faced their final years knowing they may not be able to remain together in their home. Mr. Epstein was struggling to take care of his wife who had Alzheimer's disease. He could no longer drive to get groceries or run errands - yet he desperately wanted to remain at home with his childhood sweetheart.

A neighbor connected the Epsteins with ElderHelp. ElderHelp matched the Epsteins with a Care Manager and an energetic and caring volunteer named Peggy. Mrs. Epstein and Peggy quickly became friends. Peggy drove them to and from medical appointments and shopped for their groceries twice a month. Because of Peggy's care and companionship, the Epsteins could remain at home.

Peggy often wore a red sweater which intrigued Mrs. Epstein who finally asked why she wore it so frequently. Peggy replied that it gave her courage and strength. The following week Peggy brought Mrs. Epstein her own red sweater which brought a never ending courageous smile to Mrs. Epstein's face even as she journeyed deeper into dementia. ElderHelp was able to provide the gift of time to the Epsteins to remain in the home they loved.

# Volunteer Impacts

## Spotlight on Senior A Go Go Drivers:

Driving volunteers provide seniors with door-to-door transportation services (and door-through-door transportation when necessary) for multiple purposes including medical visits, grocery shopping, church visits, social visits, and other purposes. More than just providing transportation, volunteer drivers also serve as trusting friendly face, thereby reducing social isolation and enhancing the quality of life for many frail isolated seniors. In addition, these volunteers provide seniors with a "safety net," assuring that seniors who are identified to have additional needs will be referred to necessary programs.

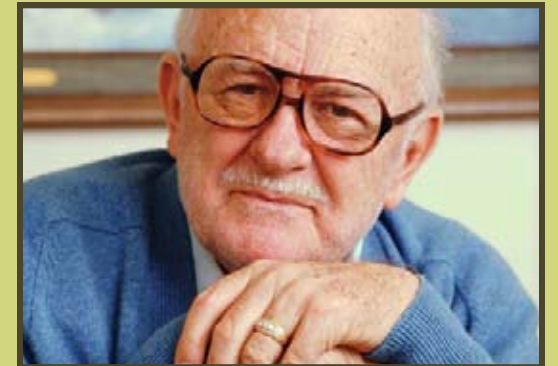
## Spotlight on Friendly Visitors:

Friendly visitors offer companionship and conversation to homebound, disabled and/or isolated seniors without family members or other support systems. They may participate in activities of mutual interest, such as watching old movies, playing cards, going for a walk or sharing lunch. The goal is to reduce depression, loneliness and isolation and to provide important friendship and support, as well as to reduce the likelihood of elder abuse and neglect among frail, homebound seniors.

## Other Opportunities include:

Financial Advocates, Home & Garden, Grocery Shoppers, Tidy Keepers and Pet Pals

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. 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.



Dear ElderHelp friends,  
I came to San Diego as a Marine recruit. I met my wife Rose here. We never had any kids but we made a happy life together in San Diego. Well today Rose is gone and I just can't get around as I did. My vision is shot so I can't drive.

It was hard to ask for help, but you all made it so easy once I did. ElderHelp is top notch! They introduced me to Mike. Mike drives me on errands and helps to my appointments. I am lucky to have found a friend in Mike and lucky to have found ElderHelp. Thank you.

Jim M., age 89