

ElderHelp



2009 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 we 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:

ElderHelp has made it through a very difficult year and owe this to our donors, volunteers and stakeholders. Early in our fiscal year, ElderHelp's staff and board responded quickly to the economic crisis with a ten point plan that included essential steps, actions and stop gaps that would ensure the sustainability of the organization. Our focus turned to maintaining and strengthening relationships with our current funders, taking advantage of new funding opportunities and restructuring in order to meet the increased demand for services from the senior population that was hit hard by this financial downslide.

Although we had to dip into our reserves, ElderHelp was able to preserve most of the cash reserves of the organization and our endowment. By cutting costs and developing new revenue sources, ElderHelp has weathered the initial storm and is prepared to ride out the next couple of years through a bumpy recovery.

Through it all we have never lost our focus of providing programs and services to low and moderate income seniors who are struggling to make ends meet and remain in their own homes and neighborhoods. There are seniors who walk into our lobby and share that they have lost their homes while many others share that the small nest egg they had built up over the past 30 years has diminished to nothing. ElderHelp is here for them. We are assisting all seniors who reach out for help and will continue to do so into the future.

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. Services include transportation to medical appointments and recreational activities, grocery shopping, help with errands, socialization, physical activity, light housekeeping, home repair, and health education and prevention. ElderHelp's Member Care Managers are key coordinators of Concierge Club services. They are trained, geriatric social workers who work with members to develop individualized care plans. They maintain regular contact with senior members to provide them with a variety of services and assistance to help them remain in their own homes



HomeShare

ElderHelp's HomeShare program matches frail, low-income seniors who want to remain in their own homes with low-income adults of all ages who are in need of housing. 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. This program brings the right people together to make sure the needs of both are met.



Independence is

“Being able to ask for help when you need it with the knowledge that you are still as worthwhile and important as anyone.”

-James F., Age 73, Concierge Club member since 2007



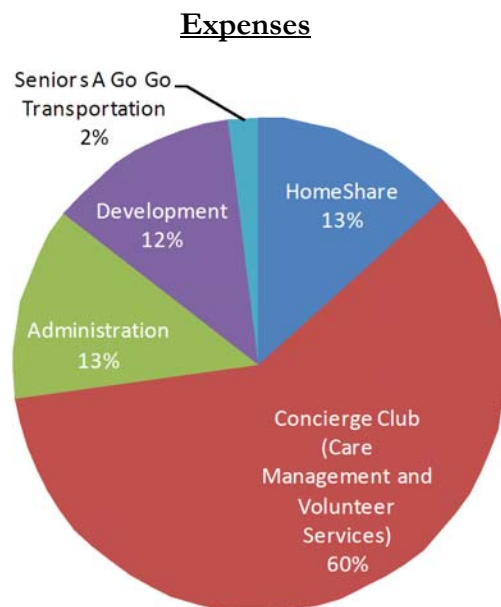
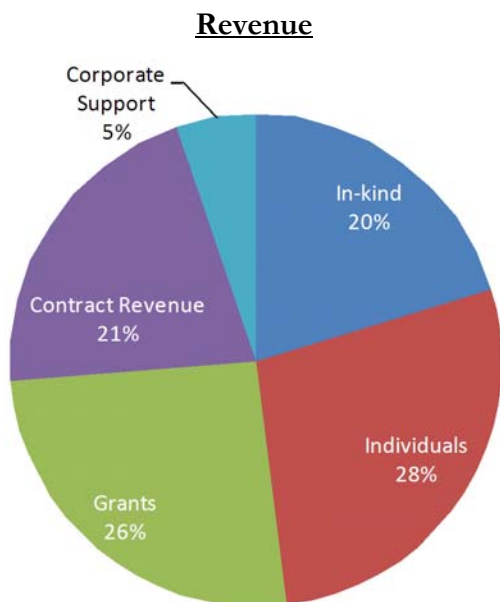
Volunteers

ElderHelp's volunteers, matched to seniors through our Concierge Club, are the lifeblood of our program and make it possible for ElderHelp to provide the Concierge Club to San Diego seniors. Concierge Club volunteers provide direct services to seniors that enhance health, independence and quality of life. Services they provide include transportation, grocery shopping, help with errands, socialization, physical activity, light housekeeping, home repair, and health education and prevention. Volunteers are recruited from all age groups throughout the City of San Diego and provide a minimum of 6 hours of service per month.

Financial Accountability

	2009	2008
Revenue		
In-kind	\$256,807	\$339,988
Individuals	\$351,053	\$439,581
Grants	\$324,438	\$545,793
Contract Revenue	\$267,494	\$239,919
Corporate Support	\$66,547	\$40,880
Total Income	\$1,266,339	\$1,606,161
Expenses		
HomeShare	\$195,709	\$219,063
Concierge Club (Care Management and Volunteer Services)	\$874,324	\$843,781
Administration	\$185,798	\$192,007
Development	\$182,948	\$304,400
Seniors A Go Go Transportation	\$30,337	\$0
Total Expense	\$1,469,116	\$1,559,251
Net Income from Operations	-\$202,777	\$46,910
Non-Operating Revenue/Expenses		
Interest	\$7,283	\$16,725
Gain(Loss) on Investments	-\$64,463	-\$38,320
Depreciation	-\$27,736	-\$28,337
Total	-\$84,916	-\$49,932
Net Income	-\$287,693*	-\$3,022

* **Note:** Net loss in income includes a \$97K adjustment to the prior year's financials completed in FY09, which resulted in an increase to the bottom line expense number. Additionally, due to the downturn in the economy, revenue was below expectations by \$101K. ElderHelp created a ten point plan to address the economic downturn and we expect to balance the revenue to expense in 2010.



The Difference a Dollar Makes

\$30 can provide the means for a volunteer to grocery shop for a senior, which includes assisting with grocery lists and stocking food items, all while providing important companionship.

\$60 can enable a volunteer handyman to put up a rail in an older person's shower stall to prevent dangerous falls at home, creating a greater sense of safety and independence.

\$100 can provide gasoline for volunteers to drive five seniors to their medical appointments, the grocery store or the pharmacy. These volunteers accompany seniors during their outing and see them safely home.



2009 ElderHelp Donors

\$75,000 +

- City of Poway
- Grossmont Healthcare District
- Hard Rock Hotel-San Diego

\$50,000 - \$74,999

- Anonymous
- The Robert Wood Johnson Foundation
- San Diego Housing Commission
- United Way of San Diego County-2007 Fire Fund

\$20,000 - \$49,999

- Alliance Healthcare Foundation
- Luce, Forward, Hamilton & Scripps LLP
- Price Charities
- S. Mark Taper Foundation
- The San Diego Foundation
- San Diego Social Venture Partners
- San Diego Association of Governments

\$10,000 - \$19,000

- Anonymous Donor
- The De Falco Family Foundation
- The Eugene and Joan Foster Fund
- Connie Golden
- HD Supply
- Intuit
- Ellen Browning Scripps Foundation
- Peri and Peg Urvek
- Weingart Foundation
- The Wells Fargo Foundation

\$5,000 - \$9,999

- BD Biosciences
- Charles and Ruth Billingsley Foundation
- Care West Insurance
- Change A Life Foundation
- City of San Diego
- Coughlin, Stoia, Geller, Rudman & Robbins
- Jeffrey Keller
- Janet Lacey
- Maurice J. Masserini Charitable Trust
- Rancho La Puerta, LLC
- San Diego Human Dignity Foundation
- Sempra Energy Foundation

- Marie Tuthill
- Union Bank of California
- United Way of San Diego
- UPS
- Judith Wenker

\$1,000 - \$4,999

- Michelle Adams
- American Red Cross
- Anderson Direct Marketing
- AT&T TelecomPioneers
- Barney & Barney LLC
- Bell Charitable Foundation
- Beta Sigma Phi
- Binh Dang Photography
- Bob Brush
- The Burnham Foundation
- California Bank & Trust
- Kenneth and Darlene Carpenter
- Holly Chisholm
- City of La Mesa
- City of Santee
- Yale and Judy Combs
- Comfort Keepers In Home Care
- Community Service Association
- Vibra Hospital of San Diego
- Tex Cornwell
- The Country Friends, Inc.
- Cush Automotive Foundation
- Charles C. Edwards
- Epsten, Grinnell & Howell
- Danah Fayman
- The Fieldstone Foundation
- Sara Fitzpatrick
- Dorothy Frels
- Maureen Gray
- James Harber
- Maurice Harouche
- Ruth Hayward
- Jones Day
- Jim Kennedy
- Legal Reprographics Inc.
- Joe and Lisa Luiso
- Marcy Mackless
- Majors & Fox , LLP
- Peggy Matthews
- Kimberly McDonnell
- Kay Miller
- North Park Lion's Club
- John G. Pictcairn
- Pillsbury LLP
- Scatena Daniels Communications

- Qualcomm Inc.
- Judith Radke
- Gerald and Christa Reynolds
- San Diego Medical Services Enterprise
- San Diego National Bank
- San Francisco Consumer Action, Inc
- Neal and Margaret Schmale
- Scripps Home Health
- Soroptimist International of La Mesa
- C. Jean Struiksmma
- Richard Tiefenbach
- Joseph Tracy
- Douglas R. Tribble
- TrustWorks Group, Inc.
- Viejas Enterprises
- Henry and Barbara Vostmyer
- Waxie Sanitary Supply, Inc.
- Keith and Priscilla Webb
- Weingart-Price Fund
- Wells Fargo
- Craig and Carol Whitwer
- Janet Wornat
- Christie and Robert Wright

\$500 - \$999

- A Better Solution
- A-1 Hearing Aid Centers, Inc.
- Alfonso Arana
- Elaine Balok
- Blackbaud
- Mary Louise Boehne
- Keith and Suzanne Bromley
- Barbara J. Brown
- Eduardo Bustamante
- Care South Home Health
- Chevron
- Jena Conner
- Carol Danbrook
- Dunn & Burger, Inc.
- Edward Jones
- Nusara Engstrom
- Betty and Donald Erickson
- Drew and Debbie Forray
- Nancie Glidden Pfingsten
- Keith Gran
- Greenfield Paper
- Judge and Mrs. Gilbert Harelson
- Matthew and Julie Harelson
- Brian and Hilary Harrison
- Heritage Senior Care, Inc.
- Cindi Hill
- Gilda Hill
- Home Instead Senior Care
- Derek Hubbard
- Chau Huynh
- Sean Kirschenstein
- Jo Ann and Lee Knutson
- Legions III Corp
- Gevena LePre
- Robert and Vivien Lichtman
- Louise Liggett
- Lightbridge Hospice
- Los Rancheros Kiwanis Club
- Michael and Karen Lynch
- MADCAPS
- Michael and Laura Martella
- Donald and Jennifer Melucci
- Mark Merlo
- David Minton
- Patrice Mintun
- Charlotte Nielsen
- Option Care
- Pacific Ambulance-San Diego
- Micah and Marguerite Parzen
- Yvonne Perez
- Plush Lounge
- Poinsettia Senior Mobile Home Park
- Pride Staff
- Matt and Morgana Probst
- Hallie Putterman
- Lawrence Salisbury
- San Diego County Employees Charitable Organization
- Mary Jo Schritt
- Donna Sefton
- Sharp Rees Stealy
- SPRITES
- Donald and Henrietta Staley
- Kim Stewart
- Sunrise Senior Services of La Jolla
- Bonnie Thomas
- Louis Tommasino
- Catharine Truza
- Sharon Turner
- Chris Uchiyama
- Karen Walker

Because of Donors Like You...

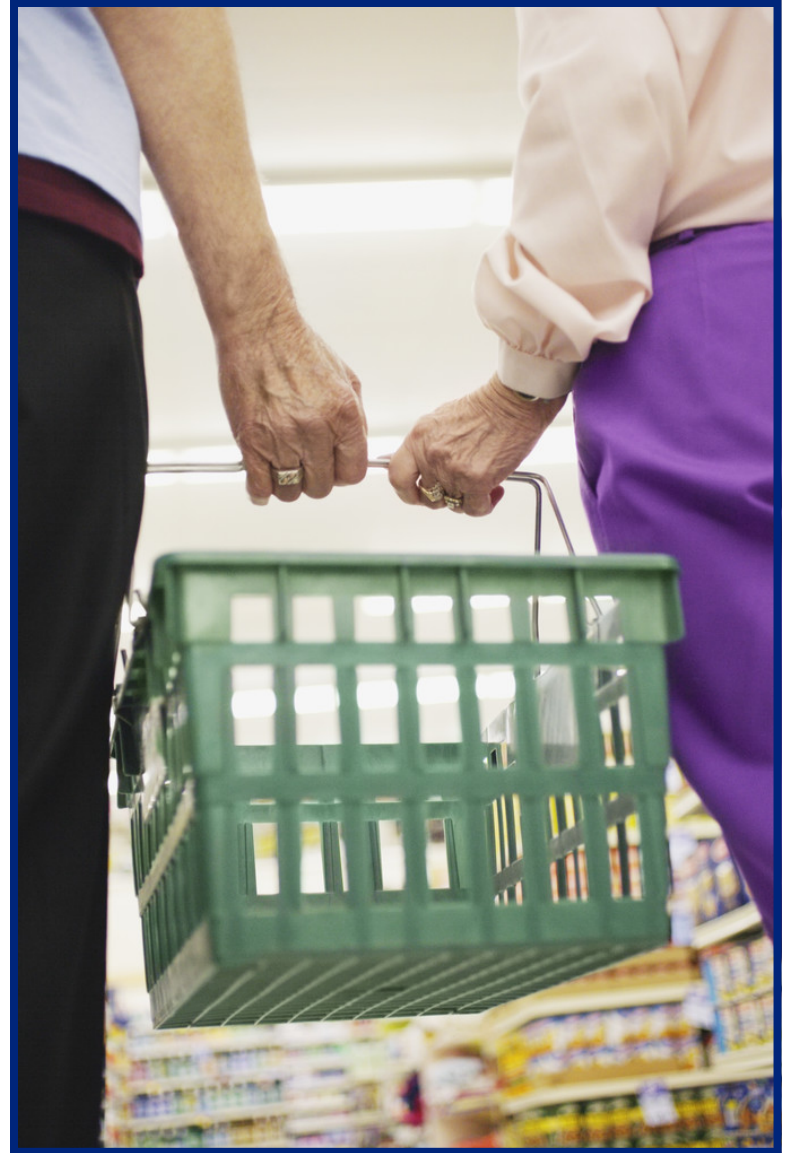
97% of Concierge Club members have avoided long-term care facility placement

96% of identified members showed a reduction in missed doctor's appointments

93% of Concierge Club members' care plan problems were resolved

77% of members who were identified to have low levels of emotional well-being have shown improvement

93% of identified members showed a reduction in emergency room visits



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.

Staff

Leane Marchese
Executive Director

Sarah Shepard, CFRE
Associate Executive Director

Cynthia Beisiegel
Volunteer Services Manager

Anya Delacruz
Member Care Manger

Cynthia Hansen
Lead HomeShare Coordinator

Ana Hernandez-Bravo
Executive Development Coordinator

Mark Medeiros
Business Manager

Nicoletta Meo-Cook
Member Care Manager

Emily Merritt
Member Services Director

Luellen Reese
Bookkeeper

Robert Shearer
HomeShare Coordinator

Cara Simpkins
Wildfire Recovery Care Coordinator

Sunita Upchurch
HomeShare Coordinator

Anneliese Wells
Member Liaison

Board of Directors

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Judith Wenker
Vice President

Shirley Thomas
Secretary

Todd Miller
Treasurer

Midge Costanza
Mathew Fink
Emily Gates

Lisa Luiso
Kimberly McDonnell
Valerie Peck, CFP

Michael Wastvedt, CPA
Katie Wiest
Janet Wornat



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4069 30th Street
San Diego, CA 92104
619.284.0214

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

CLAIREMONT (*HomeShare Only*)
4425 Bannock Street
San Diego, CA 92117
858.200.0011

LEMON GROVE
Lemon Grove Senior Center
8235 Mount Vernon St.
Lemon Grove, CA 91945
619.337.1425