



2012

Annual Report



Dear ElderHelp Supporters:

For 40 years, ElderHelp has successfully provided personalized services and information that help seniors remain independent and live with dignity in their own homes. Last year, we were faced with many changes that resulted in new senior staff members and a new location. With the support of the ElderHelp board, the extraordinary staff members were able to meet the challenges and are working to maintain the programs that continue to meet the needs of seniors who wish to remain living independently in our community.

I would like to welcome our new Interim Executive Director/Chief Operating Officer, Deb Martin. She has over 20 years experience in the hospitality industry where she has won multiple awards for her outstanding performance in business. Deb is known across the nation for her strong management skills with a proven record for operation improvement and building strong, sustainable business models. She has already made a huge impact on focusing our organization to evolve our core mission to meet the growing demands of our aging population in the community.

I would also like to introduce our new Development Manger, Debbie Fitzhugh. She provides over 15 years of experience within the non-profit industry including San Diego State University and the Girl Scouts of the USA. Debbie specializes in donor relations, fundraising, and special events.

We have been recognized with several opportunities to highlight our programs as well as our reputation for innovation. A study was recently completed by the Center for the Advanced Study of Aging Services at U.C. Berkeley that evaluated our Concierge Club program. The study, funded by the SCAN Foundation, included an evaluation resulting in extraordinarily positive measurable outcomes and demonstrates the value that all of ElderHelp's members receive.

ElderHelp's unique village model continues to be recognized by other villages and foundations nationwide. We recently received funding that allows the opportunity to share our Concierge Program model and experience with another village, emphasizing a strong Case Management component as well as paraprofessional volunteers. This collaboration will give us the opportunity to develop a standard for best practices that addresses the future of aging in place.

ElderHelp continues to expand its revenue sources and focus on developing a sustainable business model in support of our programs. For every grant that we receive, over 80% of every dollar goes directly to running our programs. The Board is committed to developing and implementing long term strategic goals that will ensure ElderHelp's success now and into the future.

We look forward to serving more seniors through our nationally recognized programs in 2013. Thank you for your continued support,



Todd Miller
Board President, ElderHelp of San Diego

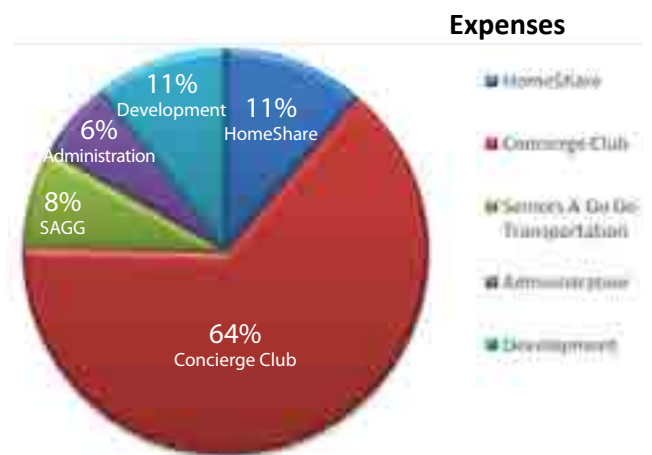
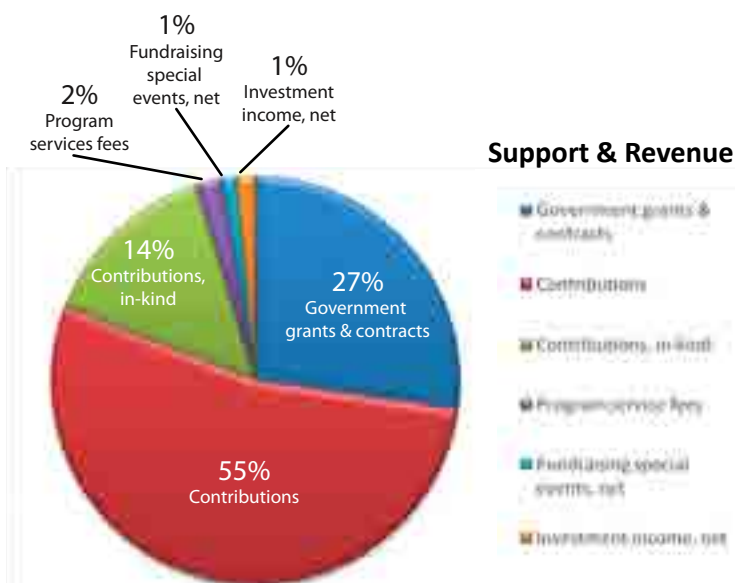


Financials

	2012		2011
Support & Revenue			
Government grants & contracts	\$ 283,011	\$	314,939
Contributions	557,034		730,233
Contributions, in-kind	149,390		106,358
Program services fees	21,425		10,664
Fundraising special events, net	12,153		84,526
Investment income, net	15,434		83,336
Other income	37		2,175
Total Support & Revenue	\$ 1,038,484	\$	1,332,231

Expenses

HomeShare	152,445		164,621
Concierge Club	862,423		698,759
Seniors A-Go-Go Transportation	106,182		105,055
Administration	83,808		135,562
Development	142,692		125,279
Capital Project	528		8,029
Total Expense	\$ 1,348,078	\$	1,237,305



Our annual audited financial statement is available upon request.

Team

ADMINISTRATION

Deb Martin
Interim Executive Director/
Chief Operating Officer

Debbie Fitzhugh
Development Manager

Michelle Martin
Marketing & Development Coordinator

Carol Stachwick, CPA
Chief Financial Officer

Nansi Kiwanuka
Administrative Assistant

PROGRAMS & SERVICES

Anya Delacruz
Member Services Director

Angelica Hunter
Member Care Coordinator

Monica Gonzales
Member Care Coordinator

Carrie McClellan
Outreach Manager

Amy Hull
Program Coordinator

Shari Dawson
Transportation Coordinator

Robert Shearer
Lead HomeShare Coordinator

Stacey Uy
HomeShare Coordinator

Sunita Upchurch
HomeShare Coordinator - Poway

2013 Board Members

Todd Miller, President
Asset Manager at Silvergate Bank

Judith Wenker, Past President
Attorney

Cindi Hill, Vice President
Compliance Consultant

Shirley S. Thomas, Secretary
Retired

Lisa Luiso, Treasurer
Vice President at Wells Fargo Bank

Elaine Balok
Estate Attorney

Nicole Darling
Television Producer at Bay City Television, San Diego 6

Ken Davenport
Partner, San Diego Social Venture Partners

Mathew Fink
President at Comfort Keepers

Emily Gates
Attorney, Wilson Turner Kosmo LLP

Amy Nelson
Owner / Director, Mission Home Health

Maggie Sayre
Owner, Sayre Consulting, LLC

Katie Wiest
Director, Operations at Qualcomm Incorporated

ADVISORY BOARD

Judy Combs, Chair

Tex Cornwell

Ed Gergosian

Ruth Hayward

Lynn Silva

Karen Walker

Thank you to our Donors

\$75,000 & Above

- ◆Alliance Healthcare Foundation
- ◆Major & Fox
- ◆San Diego Housing Commission

\$50,000 - \$74,999

- ◆City of Poway
- ◆Del Mar Healthcare Fund at The San Diego Foundation
- ◆SANDAG-TransNet

\$25,000 - \$49,999

- ◆Grossmont Healthcare District
- ◆Richard Helmstetter Family Foundation
- ◆The Scan Foundation
- ◆The Zitlau Family Trust

\$10,000 - \$24,999

- ◆Bell Charitable Foundation
- ◆Bravo Foundation
- ◆Al and Alma Brosio Family Fund at The San Diego Foundation
- ◆Ellen Browning Scripps Foundation
- ◆Eugene and Joan Foster Fund at The San Diego Foundation
- ◆Connie Golden
- ◆Kaiser Foundation Hospitals
- ◆George P. Lauren Foundation
- ◆Virginia Napierskie
- ◆UPS Foundation

\$5,000 - \$9,999

- ◆Archstone Foundation
- ◆AT&T Foundation
- ◆Barnhart-Reese Construction, Inc.
- ◆Charles and Ruth Billingsley Foundation
- ◆The De Falco Family Foundation
- ◆The Gold Diggers
- ◆HD Supply
- ◆Heller Foundation of San Diego
- ◆Maurice J. Masserini Charitable Trust
- ◆Mission Home Health
- ◆Sempra Energy Foundation
- ◆Silvergate Bank
- ◆Stein Family Foundation
- ◆TelecomPioneers
- ◆The Wells Fargo Foundation
- ◆The William and Ruth Tippet Foundation
- ◆Peg & Peri Urvek

\$1,000 - \$4,999

- ◆Anonymous

- ◆Anonymous Fund at The San Diego Foundation
- ◆AT&T
- ◆Barney & Barney
- ◆Bob Brush
- ◆Burnham Foundation
- ◆California Bank & Trust
- ◆Paul F. Cassle
- ◆CECO
- ◆Change A Life Foundation
- ◆Chevron Humankind Matching Gift Program
- ◆City of La Mesa
- ◆City of Santee
- ◆Comfort Keepers In Home Care
- ◆Community Service Association
- ◆Cubic Corp.
- ◆Cushman Foundation
- ◆Nicole Darling
- ◆Paul Davis
- ◆Joan Dayton
- ◆Elmcroft
- ◆Danah Fayman
- ◆Audrey Geisel
- ◆Gensler
- ◆Catherine Ingrassia
- ◆Keepsake Choices
- ◆Naomi Kleitsch
- ◆Kevin Mattson
- ◆Kimberly McDonnell
- ◆Margaret McDaniel
- ◆Catherine Miller
- ◆Nautilus Advisors LLC
- ◆North Park Lion's Club
- ◆Brad Pagano
- ◆Pratt Memorial Fund c/o Union Bank
- ◆Price Charities
- ◆Promise Hospital of San Diego
- ◆Qualcomm Inc.
- ◆Qualcomm Matching Gift Program
- ◆Gerald and Christa Reynolds
- ◆Robbins Geller Rudman & Dowd
- ◆Samuel I. & John Henry Fox Foundation c/o Union Bank
- ◆Neal and Margaret Schmale
- ◆State of California Health Care Fund
- ◆Stellar Properties LLC
- ◆Stueve Siegel Hanson
- ◆Sycuan Resort & Casino
- ◆Richard Tiefenbach
- ◆Douglas R. Tribble
- ◆Sharon Turner
- ◆Marie Tuthill

- ◆Union Bank
- ◆United Way of San Diego
- ◆United Way of San Diego County
- ◆Viejas Enterprises
- ◆Village to Village Network
- ◆Keith and Priscilla Webb
- ◆Wells Fargo
- ◆Judith Wenker
- ◆Craig and Carol Whitwer

\$500 - \$999

- ◆211 San Diego
- ◆Acute Response
- ◆Michelle Adams
- ◆American Medical Response
- ◆AT&T United Way
- ◆Bank of America United Way Campaign
- ◆Bella Vista Health Center
- ◆Boutique Care Management
- ◆Mona Brehm
- ◆Christina Casgar
- ◆Anne Clifford and John Silcox
- ◆Comfort Keepers- Coronado
- ◆Clara Marie Daniel
- ◆Betty DeLeeuw
- ◆East County Senior Service
- ◆Har-Bro Construction & Consulting
- ◆Ruth Hayward
- ◆Helen Hodges
- ◆Hughes Marino
- ◆KNS Gift Fund
- ◆Michele Laden
- ◆LivHome
- ◆Leane Marchese
- ◆Erin McGill
- ◆Mental Health Systems
- ◆MERC0
- ◆Meridian Home Care
- ◆Michael Ehrenfeld Co.
- ◆Philips Lifeline
- ◆Plymouth Congregational Church
- ◆Royal India Exquisite Resturant
- ◆Sempra Employee Giving Network
- ◆Senior Helpers
- ◆St. Paul's Retirement Homes Foundation
- ◆Place Tegland
- ◆Truist
- ◆United Way - CA Capital Region
- ◆United Way of Metropolitan Dallas
- ◆Bonnie Wesselmann
- ◆Roberta Westdal
- ◆Katie Wiest

July 1, 2011 - June 30, 2012

Concierge Club

The Concierge Club provides a comprehensive mix of services for seniors to help them remain independent in their own homes. Our services include health advocacy, home care provided by paraprofessional volunteer caregivers, high level case management, trusted referrals, grocery shopping, escorted transportation, home safety inspections and modifications, minor home repairs, light housekeeping, companionship, financial advocacy and pet care. In 2012, our programs successfully provided services to **4,418 seniors** whose goal was to remain living in their own homes and communities. The Concierge Club has grown to service **247 members** supported by **301 direct service volunteers** who provide service in the home as well as transportation.



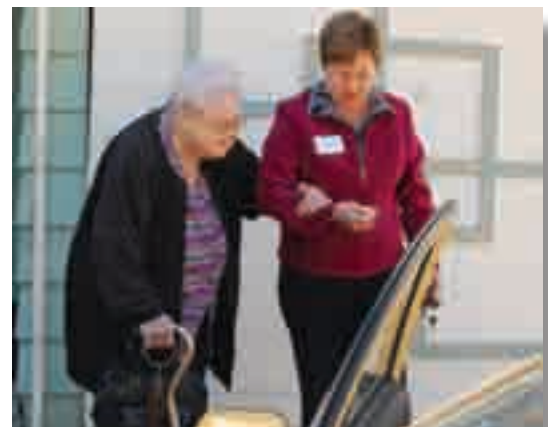
HomeShare



Over the next 10 years, studies predict a **33% increase** in homeless adults over the age of 62. HomeShare is a unique program in the City of San Diego and the City of Poway. The HomeShare program matches seniors who want to remain in their own homes with adults of all ages who are in need of housing. In 2012, HomeShare successfully matched **40 providers** with people who are looking for housing.

Seniors-A-Go-Go

In 2012, the Seniors-A-Go-Go helped a **total of 142 seniors** make their monthly appointments and a **total of 3,250 trips** were completed by volunteer drivers. Volunteers drove **41,000 miles** and donated over **3,000 hours**.



For more information about our programs and volunteer opportunities, go to www.elderhelpofsandiego.org

You can make a difference in the life of a senior ...

Mary, a Concierge Club member, was regularly admitted to the hospital due to complications related to various chronic and life threatening medical conditions including obesity, diabetes, difficulty ambulating and being legally blind. When she returned home, Mary felt isolated and suffered from mobility challenges. She realized that she needed assistance and decided to call ElderHelp. A *Plan of Care* was developed to help Mary remain living independently in her own home.

Mary was matched with volunteers who provided trips to the grocery store, doctors appointments, and errands along with meal preparation and assistance with her bills. The volunteers assisted with the in-home adaptive equipment prescribed to prevent future falls and provided education on health and safety. Through donations, ElderHelp was able to purchase grab bars, a hand held shower, a shower chair, sheets for her hospital bed and a talking scale so Mary could take control of her health.

Since joining the Concierge Club, Mary has lost nearly 100 pounds and has been able to manage her diabetes through behavior modification. Her weight loss has had a positive impact on her self-esteem and aided her mobility. Mary believes that the support provided through ElderHelp has saved her life. Mary is just 1 of 100,000 low-medium income seniors living in San Diego who are faced with these challenges.

The support of people like you allows ElderHelp the opportunity to make a difference in the life of seniors living in our community. Here are ways you can get involved:

- ◆ Become a volunteer
- ◆ Support ElderHelp programs and services with a cash donation
- ◆ Make a gift in honor or memory of a loved one
- ◆ Name ElderHelp as a beneficiary
- ◆ Join our Adopt-A-Senior program

Thank you for helping us make a difference!



Mission & 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.



ElderHelp of San Diego
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