**TEAM MEMBERS**

**ADMINISTRATION**
Deborah Martin  
Chief Executive Officer / Executive Director

John Brannelly  
Development & Communications Director

Michelle Martin  
Marketing & Development Coordinator

Lori Schmitz  
Accountant

Nansi Kiwanuka  
Office Administrator

**PROGRAMS & SERVICES**
Anya Delacruz  
Member Services Director

Angelica Hunter  
Member Care Coordinator

Monica Gonzales  
Member Care Coordinator

Cynthia Hansen  
Program & Education Coordinator

Carrie McClellan  
Outreach Manager

Amy Hull  
Volunteer Services Manager

Shari Dawson  
Transportation Coordinator

Robert Shearer  
Lead HomeShare Coordinator

Shanika Webb  
HomeShare Coordinator

Sunita Upchurch  
HomeShare Coordinator - Poway

**BOARD MEMBERS**

Todd Miller, President  
Silvergate Bank

Mathew Fink, Vice President  
President & CEO, Comfort Keepers

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

Russell Winslow, Treasurer  
Partner, Pestotnik + Gold LLP

Elaine Balok  
Estate Attorney

Ken Davenport  
CEO, Mission Edge

Cindi Hill  
Hill Compliance Advisors

Alex Marjanovic  
Regional Sales Director, DTI

Amy Nelson  
Owner / Director, Mission Home Health

Maggie Sayre  
Owner, Sayre Consulting, LLC

Katie Wiest  
Director, Operations, QUALCOMM Incorporated

**ADVISORY BOARD**

Tex Cornwell  
Micah Parzen

Judy Combs, Chair  
Lynn Silva

Ed Gergosian  
Karen Walker

Ruth Hayward  
Judith Wenker

**ElderHelp would like to recognize the dedicated service of our retiring board members:**

Emily Gates  
Lisa Luiso

Shirley S. Thomas  
Judith Wenker
A MESSAGE FROM OUR BOARD PRESIDENT

ElderHelp – Honoring 40 years of service with The Year of the Volunteer

When ElderHelp began this past year, we strengthened our dedication to excellence in our service to the seniors in our community. We did this by staying true to our Mission of providing personalized services and information that help seniors remain independent and live with dignity in their own homes.

As you look over this Annual Report, I think you will share my sense of pride in the great strides we have taken in the last 12 months. Deborah Martin came to ElderHelp in August 2012 and in May of 2013, the Board of Directors appointed her as the Executive Director and Chief Executive Officer. In a very short amount of time, Deborah has motivated and propelled the staff into successfully developing a standard of best practices that addresses the future of aging in place and moves ElderHelp towards a strong financial footing.

ElderHelp’s performance this last fiscal year is a testament to our strategic position and capabilities, the discipline of our staff and the dedication of our nearly 400 volunteers. In fact, none of this would be possible without our amazing volunteers who take a significant amount of care and time to provide the much needed support to our seniors. Because of their critical role to ElderHelp, we are dedicating our new fiscal year to them – The Year of the Volunteer. Deb talks more about this later in this report.

ElderHelp will continue to provide important services through our core programs of the Concierge Club, Seniors-A-Go-Go and HomeShare. ElderHelp is also looking towards the future by focusing on creating collaborations and partnerships with other senior service organizations to better meet the increasing needs of those we serve.

This Annual Report chronicles ElderHelp’s significant positive progress over the course of the 2012-2013 fiscal year and highlights programs that will continue to define ElderHelp as it moves into the future.

Thank you to all of our supporters, especially our major donors listed on page 5 of this report, for all they have contributed to assist ElderHelp in achieving such momentum. Without them, our work would not be possible.

Warmest Regards,

Todd Miller
President, ElderHelp of San Diego
Board of Directors
**FINANCIAL SUMMARY**

### Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Grants &amp; Contracts</td>
<td>$227,808</td>
<td>$283,011</td>
</tr>
<tr>
<td>Contributions</td>
<td>573,051</td>
<td>557,034</td>
</tr>
<tr>
<td>Contributions - In-Kind</td>
<td>236,792</td>
<td>149,390</td>
</tr>
<tr>
<td>Program Services Fees</td>
<td>33,479</td>
<td>21,425</td>
</tr>
<tr>
<td>Special Events, Net</td>
<td>42,527</td>
<td>12,153</td>
</tr>
<tr>
<td>Investment Income, Net</td>
<td>45,994</td>
<td>15,434</td>
</tr>
<tr>
<td>Other Income</td>
<td>748</td>
<td>37</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td><strong>$1,160,399</strong></td>
<td><strong>$1,038,484</strong></td>
</tr>
</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>HomeShare</td>
<td>142,678</td>
<td>152,445</td>
</tr>
<tr>
<td>Concierge Club</td>
<td>656,183</td>
<td>862,450</td>
</tr>
<tr>
<td>Seniors A Go Go Transportation</td>
<td>96,240</td>
<td>106,155</td>
</tr>
<tr>
<td>Administration</td>
<td>110,956</td>
<td>83,808</td>
</tr>
<tr>
<td>Development</td>
<td>141,171</td>
<td>142,692</td>
</tr>
<tr>
<td>Capital Project</td>
<td>-</td>
<td>528</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td><strong>$1,147,228</strong></td>
<td><strong>$1,348,078</strong></td>
</tr>
</tbody>
</table>

### Net Income

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Income</strong></td>
<td><strong>$13,171</strong></td>
<td><strong>($309,594)</strong></td>
</tr>
</tbody>
</table>
$75,000 & Above
- Alliance Healthcare Foundation
- San Diego Housing Commission
- The Weinberg Foundation

$50,000 - $74,999
- City of Poway
- SANDAG-TransNet

$25,000 - $49,999
- May and Stanley Smith Charitable Trust

$10,000 - $24,999
- Del Mar Healthcare Fund at The San Diego Foundation
- Ellen Browning Scripps Foundation
- Eugene and Joan Foster Fund at The San Diego Foundation
- George P. Lauren Foundation
- Connie Golden
- Richard Helmstetter Family Foundation
- Kenneth T. & Eileen L. Norris Foundation
- QUALCOMM Inc.
- Silvergate Bank
- Southwestern Yacht Club
- The SCAN Foundation
- UPS Foundation
- Weingart Foundation

$5,000 - $9,999
- Anonymous
- Charles and Ruth Billingsley Foundation
- Charles A. Frueauff Foundation Inc.
- Samuel and Katherine French Fund
- San Diego Gas & Electric
- Stein Family Foundation
- Turk Family Foundation
- Peri and Peg Urvek
- Village to Village Network
- The Wells Fargo Foundation

$1,000 - $4,999
- Anonymous Fund at The San Diego Foundation
- Ms. Patricia J. Burns
- Mr. Paul F. Cassle
- Charitable Auto Resources Inc.
- City of La Mesa
- City of Santee
- Comfort Keepers In Home Care

$500 - $999
- Jean Anderson
- AT&T United Way Employee Giving Campaign
- Ms. Elaine Balok
- Bank of America United Way Campaign
- California Bank & Trust
- Ken and Juliet Davenport
- Michael Ehrenfeld Company
- Ms. Christine Elliott
- Ms. Francine Finn
- Gensler
- Kaiser Permanente
- Liberty Fiduciary
- Deborah Martin
- Linda Mattrey
- Seasons Hospice & Palliative Care
- Sempra Employee Giving Network
- Sharp Health Plan
- Paula Taylor and Bernie Kulchin
- Jeffrey and Shirley Thomas
- Richard Tiefenbach
- Trust
- United Way - CA Capital Region
- United Way Donor Designation
- Katie Wiest
- Xtreme Care Ambulance

Ms. Sharon Turner
US Bank
Wells Fargo
Ms. Judith Wenker
Craig and Carol Whitwer
Seniors-A-Go-Go provides seniors with escorted, door-through-door transportation. In January, we formed a partnership with Alpha Project, to provide backup rides. They helped us to provide 86 rides to seniors, who we wouldn’t have been able to serve otherwise. Since FY12, our rides have increased 37%; 62% of rides were for medical appointments; we experienced a 20% increase in the number of rides provided for medical-related appointments; and a 25% increase in the number of ride upgrades (those purchasing a package of extra rides).

The Concierge Club provides seniors with services such as: care coordination, grocery shopping, transportation, friendly visits, minor home repairs, home safety inspections, daily check-in calls, budget and check writing assistance, gardening and much more. In FY13, the Concierge Club served 1,587 seniors, families and other community members by providing information, referrals and resources; enrolled 79 new Concierge Club members; provided services to 297 Concierge Club members; and provided 5,120 rides to medical appointments and other essential errands.

HomeShare serves those who are looking for affordable housing or have a spare room in their own home and would like someone to move in with them. In the City of San Diego, ElderHelp’s HomeShare program had a 9% increase in the number of housing referrals and a total of 25 matches for FY13. While HomeShare for the City of Poway had the number of seekers more than doubled (128%) and a total of 10 matches for the year.

Seniors-A-Go-Go provides seniors with escorted, door-through-door transportation. In January, we formed a partnership with Alpha Project, to provide backup rides. They helped us to provide 86 rides to seniors, who we wouldn’t have been able to serve otherwise. Since FY12, our rides have increased 37%; 62% of rides were for medical appointments; we experienced a 20% increase in the number of rides provided for medical-related appointments; and a 25% increase in the number of ride upgrades (those purchasing a package of extra rides).
It’s been a little over a year since I first walked through the doors of ElderHelp, not quite knowing what to expect. What I found was dedicated, hard working volunteers determined to make a difference in the lives of seniors. It’s no secret to those close to ElderHelp, that the last year brought tremendous change to our team. New leadership, new offices and a revived focus on our Mission to provide services to seniors who wish to remain in their homes as long as safely possible. Despite all the change, ElderHelp’s volunteers have not once varied in their tireless work and passion for serving our senior community.

Our amazingly unselfish volunteers, who inspire me every day, make all things possible for ElderHelp and the seniors we serve. With over 400 volunteers donating their time, ElderHelp is able to provide affordable, yet critical services to seniors in need. These services include shopping for groceries, giving rides to medical appointments, providing much needed companionship and helping with tasks around the home such as cleaning and assistance with pet care as well as bill paying.

Quite simply, our volunteers are the reason ElderHelp is able to make such a significant impact on the seniors we serve. In honor of them and our 40th Anniversary, we are calling 2014 “The Year of The Volunteer”. With our deepest gratitude, we look forward to highlighting and recognizing volunteer achievements throughout the year.

A special thanks to past board president Judy Wenker and current board member Elaine Balok, both respected attorneys in San Diego, a new ElderHelp Planned Giving Task Force has been launched to garner support from people who would like to leave legacy gifts to ElderHelp of San Diego in their estate planning.

For information on how you can make a major impact on the future of how ElderHelp cares for seniors in San Diego, please email CEO Deborah Martin at DMartin@elderhelpofsandiego.org or call (619) 284-9281 x112

Helping seniors remain independent and live with dignity in their own homes.
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.