Team Members

**ADMINISTRATION**

Deborah Martin  
CEO / Executive Director

Anya Delacruz  
Associate Executive Director

Lori Schmitz  
Accountant

Gretchen Veihl  
Director of Philanthropy

Carol Waltz  
Development Manager, Planned Gifts

Jennifer DeMik  
Grants Coordinator

Sally King  
Office Administrator

**PROGRAMS & SERVICES**

Amy Hull  
Volunteer Services Manager

Carrie McClellan  
Outreach Manager

Nansi Kiwanuka  
Transportation Coordinator

Cathy Ingrassia  
Transportation Assistant

Angelica Hunter  
Member Care Coordinator

Monica Gonzales  
Member Care Coordinator

Nicole Villanueva  
Enrollment/Transition Care Coordinator

Shanika Webb  
Lead HomeShare Coordinator

Amber Fedosh  
HomeShare Coordinator

Kimberley Sloan  
HomeShare Coordinator, Poway

2015

**BOARD MEMBERS**

Nicole Darling, President  
Public Information Officer, City of San Diego

Russell Winslow, Vice President  
Partner, Pestotnik LLP

Nikki Baumgartner, Secretary  
Partner, NavigateHCR

Cindi Hill, Treasurer  
Hill Compliance Advisors

Todd Miller, Past President  
Asset Manager, Port of San Diego

Candice Caufield  
Legal Secretary/Assistant, Hahn Loeser & Parks LLP

Kristen Chazaud  
Owner, Keepsake Companions

Danny Covarrubio  
Medicare Reimbursement, Kaiser Permanente

Bill Eiffert  
Volunteer

Brendan Farrelly  
Vice President, Trew Financial & Benefits Group, Inc.

Alex Marjanovic  
Regional Sales Director, DTI

Kerrie-Ann Stidum  
Client Support Specialist, AT&T GBS Global

Jamie Velez  
Regional Owner, Live 2 B Healthy® Senior Fitness

Katie Wiest  
Director of Operations, Qualcomm

**ADVISORY BOARD**

Judy Combs, Chair

Ed Gergosian  
Lisa Luiso  
Lynn Silva

Tex Cornwell  
Matthew Fink  
Micah Parzen  
Karen Walker

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

Jessica Sheu-Gruttadauria  
Graduate Student, The Scripps Research Institute

Maggie Sayre  
Owner, Sayre Consulting, LLC
We’ve all heard the expression “home is where the heart is.” At ElderHelp, we are dedicated to helping seniors remain in their homes, living independently as long as possible. Our staff and volunteers, including our Board of Directors, pour their hearts into this mission, giving countless hours and treating each person we serve with care and compassion. This loving act of service is something, we believe, every senior deserves regardless of income level or zip code.

Recently ElderHelp found a new home, an innovative space where the organization can collaborate with key partners to reach even more seniors in San Diego County. This relocation brings us to Kearny Mesa in a space shared with the 2-1-1 Connection Center, where we hope to explore new ideas and opportunities to expand our services. Although our office space has changed, our mission remains the same. As you look over this Annual Report, please reflect on the importance of helping seniors stay in their homes as we work together to provide dignity and respect to these deserving members of our community.

Here are some 2015 highlights:

- We enrolled 115 new members, a 60 percent increase from last year
- We increased our caseload by 16 percent
- We served a total of 351 members
- Our 30 day hospital readmission rate fell from 11 percent (FY14) to nine percent (FY15)
- 11,714 volunteer hours were reported, a value of $308,547
- We completed 23 HomeShare matches in San Diego, a 35 percent increase from last year
- We served nearly 5,600 seniors and their families in 2015

Our second year of strong fiscal performance met both revenue and expense goals, while showing a profit to reinvest back into our programs. The detail is provided on page 4. Much of this growth was made possible with ongoing support from many partners, who are included within these pages.

Of course the generosity of individual donors, members and volunteers impacted our organization as well. Our Essence of Life Awards in March highlighted their many contributions in a heartwarming afternoon of celebration. Assembly Speaker Toni Atkins addressed the gathering with accolades for the organization’s impact in the community.

To all of our supporters, many of them listed in this report and the many who work behind the scenes, I thank you for your service to seniors in San Diego.

Nicole Darling  
President, ElderHelp of San Diego  
Board of Directors

Nicole and her Mother started volunteering with ElderHelp in 2005. They share their enthusiasm with Nicole’s daughter, Coryn.
## Financial Summary

### Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>FY15</th>
<th>FY14</th>
</tr>
</thead>
<tbody>
<tr>
<td>Government Grants &amp; Contracts</td>
<td>$262,646</td>
<td>$260,872</td>
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<tr>
<td>Contributions</td>
<td>728,154</td>
<td>588,456</td>
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<td>Contributions, In-Kind GAAP</td>
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<td>Program Service Fees</td>
<td>30,270</td>
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<td>Special Events, Net</td>
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<td>Investment Income, Net</td>
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<td>Loss on Equipment Disposal</td>
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<td>-3,710</td>
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<td><strong>Total Income</strong></td>
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<td>Contributions, In-Kind Other</td>
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### Expenses

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<tr>
<th>Category</th>
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<th>FY14</th>
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<tr>
<td>Concierge Club</td>
<td>$379,905</td>
<td>$435,776</td>
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<tr>
<td>HomeShare</td>
<td>179,741</td>
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<td>Seniors A Go Go Transportation</td>
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<td>Administration</td>
<td>94,325</td>
<td>104,196</td>
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<tr>
<td>Development</td>
<td>121,956</td>
<td>120,122</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td>$938,618</td>
<td>$968,824</td>
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**Net Income**

<table>
<thead>
<tr>
<th></th>
<th>FY15</th>
<th>FY14</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>$141,418</td>
<td>$45,694</td>
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</table>
“One of the best measures of a country is how it treats its older citizens.” I literally applauded as I watched President Obama make this statement during a live-stream broadcast of the 2015 White House Conference on Aging.¹ I couldn’t agree more. Yet, why is it so difficult to secure appropriate resources, support and protections for this incredibly viable and valuable segment of our population? The answers to this question are wide and varied, but at ElderHelp, our goal is to continue to play a critical role in a long term solution.

It has been a little over three years since I first crossed the threshold at ElderHelp. When I arrived, we had a total staff of twelve with four of them headed for medical leaves. Today, we have a team of seventeen. We have grown from 247 members to 351 members and from 300 volunteers to more than 400. In 2012, we provided 3,250 rides. This year, we provided almost 6,000 rides. Total volunteer hours this year exceeded 11,700, well above the 8,800 hours we did in 2012. Most importantly, we served nearly 5,600 seniors; the most ever in our entire 42 year history. And, just to make it all the more interesting, during this same period we were forced to move our offices twice due to changes in our lease agreements. We accomplished all this without a large increase in revenue, but through a significant improvement in operational efficiency. Simply put, we became smarter at delivering services and increasing capacity without taking a hit to our financial stability and bottom-line. We are very proud of this turnaround and I hope you are too, because it means your financial support is going exactly where it should be going, to the seniors trying to remain in their homes and in control of their aging choices.

The numbers you will see in our 2015 Annual Report are important, especially for a CEO, but it is the stories I really love. Sally, who administers our daily check-in call program (appropriately named RUOK), recently saved the lives of two members who were in need of medical attention at the time of her calls. Both clients were able to safely return to their homes after lengthy hospital stays. I now call her “Save-A-Life Sally.” Through our HomeShare program, we found a roommate for an aging couple who needed some additional support around the house. One night, the husband had respiratory distress as his wife slept soundly next to him. Their new roommate, hearing the husband’s distress, ran to the bedroom and was able to get 911 to the house in time to save his life. And then there is the ElderHelp member who lived on the 2nd story of a building without an elevator. Our Care Coordination and HomeShare program teams worked together to enroll her in HomeShare, and also worked with Section 8 housing to get her a roommate who would qualify as a registered live-in aid, providing her with much needed help in her home and enabling her to move into a 1st floor, two bedroom unit. There are hundreds more stories like this every year. Each one reaffirms the efficacy of ElderHelp’s model in providing safe aging opportunities and options for older citizens.

For all the change ElderHelp has experienced over the last three years, there are four things that have remained constant. First, a rapidly expanding aging population means the local demand for assistance with aging, housing and healthcare options will continue to grow. Second, the dedication, work ethic and compassion of our ElderHelp Team and Board of Directors remains as strong as ever. Third, our amazingly selfless and altruistic volunteers are the lifeblood of ElderHelp and remain critical to our service delivery. Fourth, we have a bounty of gratitude for the funders and donors who give their support annually and who allow us to make a significant impact in our local San Diego community.

Looking ahead, we are primarily focused on long term sustainability and scaling our programs to reach the growing need in San Diego County. Every month more than 250,000 Americans turn 65. While it has been referred to as the “silver tsunami,” I prefer the term the “silver reservoir,” which more accurately reflects the wealth of experience, talent and contributions this population still has yet to make. Or, as I recently wrote in a Dr. Seuss-like style poem to our ElderHelp team,

Seniors deserve to age  
With dignity and care.

They’ve paid their dues  
Did everything fine
They fought for our rights  
Just born at the wrong time.

I hope you will join me in celebrating the success stories on these pages and honor the names of our dedicated donors, volunteers and stewards who make the work of ElderHelp possible.

¹ http://www.whitehouseconferenceonaging.gov
SUPPORTERS

**$150,000 and Above**
The Harry and Jeanette Weinberg Foundation Inc.

**$75,000 - $100,000**
The City of Poway
San Diego Association of Governments

**$50,000 - $74,999**
May and Stanley Smith Charitable Trust
San Diego Housing Commission
Southwestern Yacht Club

**$25,000 - $49,000**
Alliance Healthcare Foundation
Charles A. Frueauff Foundation, Inc.
Grossmont Healthcare District
Maida Cooper Revocable Trust

**$10,000 - $24,999**
Barney & Barney LLC
David C. Copley Foundation
Ellen Browning Scripps Foundation
Eugene & Joan Foster Fund at the San Diego Foundation
Farrell Family Foundation
Connie Golden
Helmsetter Family Foundation
Qualcomm Foundation
S. Mark Taper Foundation
Samuel and Katherine French Fund
The William & Ruth Tippett Foundation
UPS Foundation
Walter J. and Betty C. Zable Foundation

**$5,000 - $9,999**
Charles & Ruth Billingsley Foundation
County of San Diego
Danah Fayman
Dr. Seuss Foundation
Heller Foundation of San Diego
Virginia Napierskie
Gerald & Christa Reynolds
SDG&E-Sempra Energy Utility
The De Falco Family Foundation
Turk Family Foundation
Wells Fargo Foundation

**$2,500 - $4,999**
2-1-1 San Diego
Anonymous
Anonymous Fund at the San Diego Foundation
Burnham Foundation
Charitable Adult Rides & Services
City of Santee
Cindi Hill
Nicolette & Blake Darling
Lion’s Club of San Diego
Pratt Memorial Fund c/o Union Bank of California

Rancho Bernardo Community Foundation at the San Diego Foundation
Robbins Geller Rudman & Dowd
Samuel I. and Henry Fox Foundation c/o Union Bank Sempra Employee Giving Network
Sycuan Resort & Casino
Sharon Turner
Peri & Peg Urvek
US Bank
WD-40 Company

**$1,000 - $2,499**
Anonymous
Arthur Q. Johnson Foundation
Chevron Humankind Matching Gift Program
Community Service Association
Bill Cooper
Clara Marie Daniel
Sue Erskine
Gay and Lesbian Fund for San Diego at The San Diego Foundation
Genomics Institute of Novartis Research Foundation
Teresa George & Kelly Davidson
Keepsake Companions
Chadwick Krogh
Las Primeras
Mission Beach Women’s Club Foundation
Neil & Margaret Schmale
North Park Lion’s Club
Pratt & Whitney
San Diego County Council on Aging, Inc.
Lori Schmitz & Steve Rodgers
Stacey Schmolke
The Gold Diggers
The Mirandon Foundation for Hope, Inc.
The San Diego Foundation
Richard Tiefenbach
United Way of Los Angeles
United Way of San Diego County
Craig & Carol Whitwer

**$250 - $499**
Donald & Diana Ambrose
Nicholle Asbaugh
Associated Plastering and Lathing
Elaine Balok
Bank of America United Way
Gregory Bond
Mona Brehm
Peter Burns
Lenore Cantor
Chico’s Retail Services, Inc.
Jamie & Jeremy Clear
Heidi Coggan
Jennifer Cotteleer
Armando Domiguez
Bill Effert & Leslie Hodge
James Elliott
Donald Erickson
Jeffrey Filippi
Cecilia Gatus
Tange Gavin
David & Marlene Gotz
Roland Gray
Susan Haas
International Order of the Blue Gavel District 15
Michele Laden
S. Joy Liao
Dr. William F. & Barbara McColl
Larry Ovitt
Robert Patterson
Pete Duncan, LLP
Diane Riegler
Lynn & Phil Ryan
Mary Jo Schritt
Ron Grinblat
Andrew Hippert
Helen Hodges
Paul & Melissa Hsu
Joe & Cathy Ingrassia
International Order of the Blue Gavel Auxiliary
Intuit
Jana Harris Painting Inc.
Judy Jones-Cone
Todd Kaprielian & Carol Morris
Paul Lecooq
Live 2 B Healthy® Senior Fitness
Deborah Martin & Linda Baner
Stacy Matseas
Peggy Matthews
Marianne & Mike Murray
Christopher & Nancy O’Brien
William Ostrem
Pedotekin LLP
Qualcomm Matching Grant Program
Maggie Sayre
Jessica Sheu-Grousuddauria
Shield Healthcare
R.W. & Donna Templin
Emily Wendell
Judith Wenker
Stewart Westdal
Katie & Greg West
Russell Winslow
World Vision

**$200 - $499**
Donald & Diane Ambrose
Nichole Asbaugh
Associated Plastering and Lathing
Elaine Balok
Bank of America United Way
Gregory Bond
Mona Brehm
Peter Burns
Lenore Cantor
Chico’s Retail Services, Inc.
Jamie & Jeremy Clear
Heidi Coggan
Jennifer Cotteleer
Armando Domiguez
Bill Effert & Leslie Hodge
James Elliott
Donald Erickson
Jeffrey Filippi
Cecilia Gatus
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Qualcomm Matching Grant Program
Maggie Sayre
Jessica Sheu-Grousuddauria
Shield Healthcare
R.W. & Donna Templin
Emily Wendell
Judith Wenker
Stewart Westdal
Katie & Greg West
Russell Winslow
World Vision

**$100 - $249**
Tom Abbas
Anonymous
Toni Atkins
Sherry Baker
Don & Teresa Barth
Darryl Bowlin
DeAndrea & Jeff Braelz
Mary Bridge
Lizzy Brown
Flora L. Calem, Esq.
Margaret Clement
Copy Cove of La Jolla
Philip & Rosemary Crane
Patricia Crowley
Cymer
Jason Dedic
Nancy O. Dix
Deborah Dixon
EARTHSTREAM
Donna Eckert
Lynne Eddy
Steve Elggren
George & Katharina Farrand
William Fawell
Francine Finn
Terri Flannery
Albert Folkman
Linda Gillette
Stephanie Goebel
Robert Goldman
Ashlee Gora
David Gray & Sarah White
Cathe Greenfield
Grondin Construction
Debbie Hang
Philip Harry
Wendy Havran
Sherron Heitmann
Ann Hoeppner
William Holman
Dee Huang
Intuit Donation Matching Program
Diane Kalt
Stephanie Kish
Mayumi & Gregory Klempel
Joan Kroutson
Jennifer Koonce
Gary Krueger
Elizabeth Kuhn
Thomas LaHay
Lancaster Charitable Trust
Angela Landeros
Richard & Victory Lareau
Volunteers
Essence of Life Awards Recognition Social and Charity Auction

On March 15, 2015, ElderHelp recognized those who made outstanding contributions in support of our mission. The City of Poway was acknowledged as our Community Partner. Deputy Mayor Grosch accepted the award on their behalf. US Bank received the Corporate Partner Award. Virginia Napierskie was honored as Philanthropist of the Year; F.V. “Tex” Cornwell received Ambassador of the Year; Rob Roberto was our Volunteer Spotlight; and Beverly Rodgers was Member Spotlight.

The event was held at the scenic Southwestern Yacht Club, ElderHelp’s Philanthropic Partner. California State Assembly speaker Toni Atkins acknowledged ElderHelp for our work in the community. The program was co-chaired by ElderHelp Board Members Alex Marjanovic, Jamie Velez, and Kerrie-Ann Stidum.

Holiday Angels

December 6th was a heartwarming day as Holiday Angels delivered poinsettias and gift cards throughout San Diego. For many of our seniors, this is the highlight of the holiday season. Sponsored by our friends at UPS, this annual event grows each year. The pre-delivery party in the parking lot was made even more festive with entertainment from the 5-50’s led by Keven Ford, our stilt walker John Highkin of the Fern Street Circus and Santa himself (Marc Darr) with his trusty elf photographer! Donations from Starbucks, Einstein Brothers, and Smart & Final gave everyone a jumpstart to their morning before deploying with their deliveries.

Elderhelp Lasting Legacy Society

As the years go by, more and more people realize the amazing contribution ElderHelp makes to the betterment of seniors. We’re not a large organization or one that attracts much attention, but word-of-mouth and the reputation that follows has stood us in good stead. Many want to support us and ensure their contributions count for tomorrow as well as today. To that end, they have been inspired to put ElderHelp in their wills.

Tex is just such a person. She’s more than your ordinary person, though. As a Licensed Public Accountant, she is keenly aware of how money works for individuals and organizations. Now in her 91st year, she still has her health and expresses great joy at still being alive. She continues to maintain her tax service, and because 95% of her clients are older, she sees what they have to face, both financially and otherwise. If her clients have aging or independence issues and don’t know where to turn for help, Tex makes sure that they contact ElderHelp.

Tex came to realize ElderHelp’s great benefits to seniors when she served on our Board of Directors more than 30 years ago. She learned that we can help in so many ways to bring comfort, safety and companionship to seniors. She knows we will go to great lengths to guide those in need to a better outcome. Tex trusts us to serve and care, and we have never let her down. Tex has worked all her life and feels blessed to be able to leave gifts behind that will benefit others. She has named ElderHelp as one of the beneficiaries in her estate because she believes ElderHelp has done too much good in her world not to be rewarded with her lasting legacy.
### Program Report

ElderHelp served 5,596 individuals through all programs and services in Fiscal Year ‘15

#### Information & Referral
- Includes benefits counseling, calls, one-time home and garden services
- 2,771 seniors served through Information and Referral
- 19% increase in community members served
- 22% increase in calls coming into the main office
- 57% increase of calls coming into the Poway office

#### Concierge Club & Seniors A Go Go
- Enrolled 115 new members into the program
- 60% increase in new members
- Served a total of 351 members
- 16% increase in program caseload
- 12% increase in number of rides
- Provided 5,998 rides
- 66% of rides through Seniors A Go Go were for medical appointments
- On average, we managed approximately 500 rides/month

#### Volunteer Services
- 78% of people who signed up for orientation attended an orientation
- 97% of people who attend volunteer orientation became volunteers
- 17% increase in number of volunteer hours reported
- 11,417 volunteer hours reported
- 102 new volunteers
- 393 active volunteers at the end of the fiscal year
- Total value of volunteer hours is $308,547

#### HomeShare San Diego
- 35% more matches
- 1,555 housing consultations provided
- 23 new matches
- 49 ongoing matches
- Length of average match is just over 2½ years

#### HomeShare Poway
- New matches nearly doubled
- 11 new matches
- 22 ongoing matches
- 838 housing consultations
- Length of average match is just under 2 years

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In October 2015, ElderHelp was presented with California’s 2015 Governor’s Volunteering and Service Award for Nonprofit of the Year. The prestigious award recognizes an outstanding California nonprofit who has shown an extraordinary ability to utilize volunteers in service to their organization. ElderHelp was chosen for its service and innovation while addressing the increasing needs of seniors in the state of California.
**Programs & Services**

**Concierge Club**

In Fiscal Year 2015, ElderHelp provided Concierge Club services to 351 seniors. The Concierge Club continues to strengthen health outcomes for seniors by reducing falls, providing care transitions ensuring seniors receive the services and support they need after a hospitalization, and reducing hospital readmissions.

Of those Concierge Club members hospitalized, only 9% were readmitted after 30 days, which is a 2% decrease from the previous year. Only 5% of Concierge Club members had falls during the fiscal year. This is attributed to the support provided by volunteers as well as the coordination of care provided by the Member Care Coordinators.

**HomeShare**

ElderHelp's HomeShare program is unique, offering an affordable housing option for the residents of the cities of San Diego and Poway. HomeShare matches seniors who want to remain in their own homes with adults of all ages who are in dire need of housing. Oftentimes, seniors need financial support, help around the home or companionship.

In Fiscal Year 2015, HomeShare provided 2,393 housing consultations for people looking for affordable housing options. ElderHelp has become a well-used resource for finding affordable housing opportunities for the community. 34 new housing matches were established through the HomeShare program and 71 existing matches were maintained through the fiscal year.

**Seniors A Go Go**

Seniors A Go Go provides escorted, door-through-door transportation. In Fiscal Year 2015, Seniors A Go Go provided 5,998 rides, averaging 500 rides per month. Rides for medical appointments nearly doubled as compared to last year.

We provide senior excursions at least one time every quarter. This is a way to have members meet other members and remain connected with their communities. This year’s excursions included trips to the movies, a holiday celebration, the Discovery Center and to our office for a Tea with Shakespeare.

Although medical appointments are critical to a senior’s wellbeing, Seniors A Go Go provides transportation opportunities for social engagement, which helps reduce social isolation among our members.
Betty was living alone in her two-bedroom apartment. At 80 years old, her advancing medical symptoms made meeting her daily needs difficult. She called ElderHelp and asked for assistance with transportation and grocery shopping.

During the initial enrollment visit, Betty reported multiple falls due to her limited mobility and expressed concern for her safety. She was offered a home safety inspection as well as grab bar installation to reduce the falls risk. We also noticed one of her greatest challenges was navigating the stairs to her second floor apartment, and she told us she’d like to find a downstairs unit. Our HomeShare coordinator stepped in and discovered that Betty qualified for assistance through a Section 8 voucher and a live-in aide to help with her extra needs. If she could find a housemate, she could stay in her complex, but move into a two bedroom apartment on the ground floor.

At the same time, an eager house hunter named Linda was eager to find a place to live where she could be of service. After a thorough screening, Betty and Linda were introduced and they both realized that they shared a lot of common interests and got along very well. Linda was willing and able to help Betty with her daily needs, including cooking, housekeeping, and transportation to and from various locations. It didn’t take long for these two ladies to decide that it was a match and they have been living together in their new downstairs apartment ever since. Now, Betty is able to get out of the house more and Linda is living comfortably in a place that really feels like home.