

## HOW TO REACH THE IOA

The Institute on Aging has specialized in helping people stay safe, healthy, and independent at home for more than 20 years. To learn about the IOA's complete care services, call:

(415) 750-4111

(877) 750-4111 Toll Free

[www.ioaging.org](http://www.ioaging.org)

### MAIN OFFICE

3330 Geary Blvd., 2nd Floor  
San Francisco, CA 94118

Telephone: (415) 750-4180 Administration

Fax: (415) 750-4179

### THE FRIENDSHIP LINE

A 24-hour helpline available seven days a week for seniors feeling isolated, lonely, distressed or in need of help. Professional staff and interns provide support and stay in touch by phone and home visits. The Friendship Line is also available for concerned relatives, friends or caregivers.

SAN FRANCISCO: (415) 752-3778

TOLL-FREE: (800) 971-0016

SAN FRANCISCO

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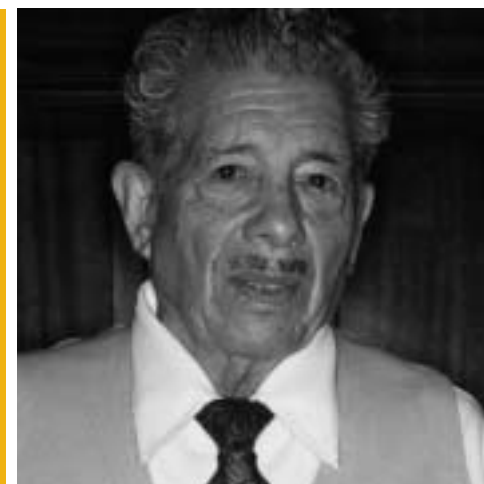
MARIN

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PENINSULA

Graphic Designer: KC Hatcher, LGS Digital

Photographer: Sharon Beals & IOA Archives



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# Institute On Aging

*Celebrating Twenty Years of  
Helping Bay Area Seniors Live Independently*

2004/2005 Annual Report



# 20 YEARS THE INSTITUTE ON AGING: MILESTONES IN HISTORY

In 2005, the Institute on Aging celebrated 20 years of service as a non-profit agency in the community. The IOA provides support to thousands of San Francisco Bay Area seniors and their families each year with its many innovative programs in health, social services, creative arts, spiritual healing, education, and research. Over the years the IOA has grown to become one of the largest providers of community-based services for seniors. These are some of the milestones that have shaped the IOA, from its early roots in Mount Zion Hospital to its present day work in the community.

**1975:** Mount Zion launches the **Adult Day Health Center** (now the **Ruth Ann Rosenberg Center**) to help frail and disabled seniors maintain their independence, the first community hospital in the United States to do so.

**1981:** Mount Zion establishes **Artworks** (now **Elders and Youth in the Arts Program**), the first in-home creative arts program in the country for homebound seniors.

**1983:** Mount Zion establishes an **Alzheimer's Day Center**, the first day center specifically for care of Alzheimer's patients in San Francisco, now the largest in the City.

**1985:** Warren Berl, Adele Corvin, Dr. Larry Feigenbaum, Rhoda and Richard Goldman, Robert Sinton and other civic leaders **establish the Institute on Aging as a separate non-profit organization.** The IOA opens offices in the community with challenge grants from the Richard and Rhoda Goldman Fund and the Walter and Elise Haas Fund. IOA is selected as the coordinating agency for **San Francisco's Elder Abuse Prevention Program.**

**1986:** IOA's **Center for Clinical and Aging Research** established jointly with UCSF's Institute for Health and Aging. Koret Foundation grant of \$300,000 to support **Alzheimer's Day Center.**

**1987:** W.K. Kellogg Foundation grants \$983,000 to the IOA to establish a program of Professional Education, the only site in the United States offering multidisciplinary post-graduate **geriatric fellowships.**

**1990:** Mount Zion Hospital merges with UCSF. The IOA becomes a subsidiary of **Mount Zion Health Fund**, a foundation created in the merger agreement.

**1992:** IOA invited to join the National Chronic Care Consortium, a group of the 20 leading healthcare organizations in the nation dedicated to innovation in chronic care delivery.

**1995:** IOA Leadership Council honors Rhoda Goldman, Richard Goldman, Ruth Ann Rosenberg, and Julius Krevens, MD. Center for **Elderly Suicide Prevention and Grief Related Services** becomes a program of the IOA.

**1996:** IOA develops formal affiliations with OnLok to establish **SeniorHealth** center on Fillmore Street, in the Western Addition, offering a Program of All Inclusive Care to Elders (PACE).

**1997:** **ElderShelter**, a joint program of the IOA and San Francisco's Adult Protective Services, opens to house seniors who have been abused or are in danger of mistreatment.

**1999:** Rose and Eugene Kleiner give as a gift to the IOA **Older Adults Care Management** (OACM), a home care and care management organization serving San Mateo and Santa Clara counties, founded by Rose Kleiner. IOA receives Thomas M. Jenkins Award, honoring the contributions of an individual, agency or other entity, which provides services to seniors. **Elders and Youth in the Arts Program** receives an Award for Excellence in Aging Programs from the United Nations.

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**2000:** IOA partners with BRIDGE housing to create a new facility at 3575 Geary Boulevard, the site of the Coronet Theater, combining IOA services and affordable senior housing. **Lead Capital Campaign** gifts received from the Goldman Family, Rose and Eugene Kleiner, Koret Foundation, Mount Zion Health Fund, and Ruth Ann Rosenberg. **Elders and Youth in the Arts Program** nominated for the Archstone Foundation's Award for Excellence in program innovation.

**2002:** San Francisco Department of Aging and Adult Services awards IOA a contract to operate **Neighborhood Resource Centers** in the Richmond, the Western Addition and the Mission, offering information and advice about senior services. IOA partners with California Pacific Medical Center to open the **Irene Swindells Center** for Alzheimer's day treatment. Marin county's **Support Services for Elders** joins the IOA; It provides fiduciary services and financial management for seniors.

**2004:** **ElderShelter** receives the California Association of Homes and Services for the Aged's Social Responsibility Award, which recognizes exemplary housing programs that have demonstrated a commitment to social justice and equal opportunity.

**2005:** **Older Adults Care Management** becomes a non-profit organization and merges with the IOA. **Bay Area Jewish Healing Center** joins the IOA and will form a multi-faith spiritual healing program. **Geriatric Assessment Service** opens, providing comprehensive diagnosis and management planning for seniors with complex health problems, and their families.

IOA launches second phase of the **3575 Geary Campaign** to establish a Senior Campus with lead gifts from Lisa and Matthew Chanoff, Rose and Eugene Kleiner Family Foundation, the Bernard Osher Foundation, Audrey and Robert Sockolov, and Justice Kathryn Werdegar and Dr. David Werdegar. The new **IOA Senior Campus** will combine affordable housing for seniors of modest income with the IOA's comprehensive health services and community programs, in one easily accessible location.



Future Home of the Institute on Aging (Currently the site of the Coronet Theater)

## OPPORTUNITIES TO SUPPORT US

The Institute on Aging relies on the generous support of donors to make our programs and services available to seniors in the community. There are a variety of ways to support the IOA.

### ANNUAL FUND

Gifts to our Annual Fund support our broad array of programs and services. Gifts may be made by check, Visa, Mastercard or through gifts of stock and may be designated for a specific program.

### GIFTS OF STOCK

If you have appreciated stocks or securities, you may make your gift with them and pay no capital gains tax. Simply ask your broker to transfer your stock/securities to the Institute on Aging account at:

Wells Fargo

Account Rep: Deron Kartoon (415) 222-6783

### TRIBUTES

You can support the Institute on Aging while honoring or remembering a loved one. Birthdays, anniversaries, weddings and memorials are some of the occasions for which you may wish to make a tribute gift. Special named funds may also be established.

### PLANNED GIFTS/BEQUEST

You can support the continued work of the Institute on Aging by making a planned gift or bequest. We would be pleased to talk with you about making a planned gift that would benefit both you and the IOA.

For more information on making a gift, please call the Development Department at (415) 750-4123.

### 2004-2005 BOARD OF DIRECTORS

Robert L. Sockolov, Chair  
Barbara Schraeger, Vice Chair  
Anthony G. Wagner, Vice Chair  
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B. Peoples Thomas, DDS  
Sandra D. Yuen, PhD  
Amy W. Zellerbach

### HONORARY LIFETIME DIRECTORS

Warren Berl  
Adele K. Corvin

### FOUNDING DIRECTOR

Lawrence Z. Feigenbaum, MD

### PRESIDENT & CEO

David Werdegar, MD, MPH

### 2004-2005

#### AUXILIARY BOARD MEMBERS

Irene Dietz, Chair  
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Cheryl Arenson  
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Lois Fried  
Barbara Greenberg  
Eve Heyman  
Roan Iscoff  
Inge Lehmann  
Gloria Mendelsohn  
Susan Merin-Oglove  
Bobbie Nathan  
Judith Presley  
Sandra Simon  
Audrey Sockolov  
Judy Williams

### HONORARY MEMBER

Suzanne Landson

## FROM OUR PRESIDENT AND BOARD CHAIR

This past year, the Institute on Aging celebrated 20 years of service to seniors in the San Francisco Bay Area. From its early beginnings in the pioneering geriatrics programs at the old Mount Zion Hospital, the "IOA" has grown into a major community-based non-profit organization with a remarkable array of programs and services designed to enable seniors to maintain their health, well-being and capacity to live safely and independently in their community.

IOA programs had a busy and productive year, with some notable new developments:

A new geriatric Assessment Service was inaugurated at the IOA with seed money support from the Mount Zion Health Fund and grants from the Archstone Foundation and other sources. The Assessment Service offers clients and concerned family or caregivers a comprehensive evaluation of health status, memory and mood changes, and functional capacity – with a view to planning the support services that would be most helpful in the situation. The new service is unique in many respects: community based, it is easily accessible without delays or bureaucratic tangle; it draws on the expertise of a multi-disciplinary staff; and it is backed by years of IOA experience in dealing with complex issues faced by older adults.

A new senior advice telephone line with an easy-to-remember telephone number, 750-4111 (one number away from 411!) lets the public know about IOA programs and its assessment service. The phone is answered by an experienced staff social worker.

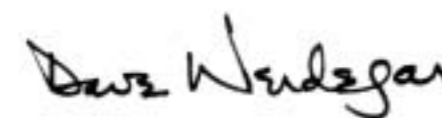
Older Adults Care Management changed to not-for-profit status, allowing it to be completely integrated with all the other IOA programs. Based in Palo Alto, OACM has been providing home care and care management services in San Mateo and Santa Clara counties for more than 20 years. It was founded by Rose Kleiner, an early pioneer in geriatric social work. The organization was given as a gift to the IOA several years ago by Rose and Eugene Kleiner in the belief that it was the best way to assure perpetuation of its services to seniors in the surrounding Peninsula community. Both Rose and later, Eugene, have since passed away. The IOA is committed to fulfilling their expectations for sustained growth and development of the enterprise they founded.

The Bay Area Jewish Healing Center has become an integral part of the IOA. It brings spiritual support to clients and families contending with difficult chronic illness, Alzheimer's conditions, those who are homebound, those in hospice care, those facing the end of life. The Healing Center is developing working relationships with colleagues in other faith communities to expand the availability of spiritual support programs and personnel to older adults in the community.

Looking ahead, we are hopeful that the new year will bring early approvals by the City for the construction of the IOA's new building at 3575 Geary Boulevard. This exciting project, in partnership with BRIDGE Housing, a leading non-profit developer, will be a showcase of senior affordable housing in combination with IOA services. It will provide attractive, well-designed space for the IOA's programs. We look forward to "ground breaking" during the new year.

The IOA is able to do all its good work owing to an exceedingly capable staff, a dedicated Board of Directors, and wonderfully generous support from the community.

With all best wishes for the new year.



David Werdegar, MD, MPH, President & CEO



Robert Sockolov, Board Chair

DIANNE FEINSTEIN  
CALIFORNIA



COMMITTEE ON APPROPRIATIONS  
COMMITTEE ON ENERGY AND NATURAL RESOURCES  
COMMITTEE ON THE JUDICIARY  
COMMITTEE ON RULES AND ADMINISTRATION  
SELECT COMMITTEE ON INTELLIGENCE

## United States Senate

WASHINGTON, DC 20510-0504

<http://feinstein.senate.gov>

March 1, 2006

Dear Friends of the Institute on Aging:

I send my congratulations as the Institute on Aging celebrates its 20<sup>th</sup> anniversary. The IOA's services have helped seniors maintain their health, independence, and continued involvement in the life of the community. The staff serves their clients with extraordinary skill and compassion, and I commend their dedication. All of you who have guided and supported the IOA's growth and development can be proud of its accomplishments.

In 1985, while I was Mayor of San Francisco, some of the City's visionary leaders recognized that frail and isolated seniors have special needs for healthcare and supportive services. Working with Mount Zion Hospital, Rhoda and Richard Goldman, Dr. Larry Feigenbaum, Adele Corvin, Warren Berl, and Robert Sinton founded the Institute on Aging as a community-based non-profit organization. The IOA has since established itself as a recognized leader in its field.

I am especially pleased that under the leadership of my former Public Health Director, Dr. David Werdegar, the IOA will be building a new senior campus at 3575 Geary Boulevard, currently the site of the Coronet Theater. It will be a unique combination of affordable housing for seniors and the IOA's extensive array of services. I expect this innovative new facility will become a model for the entire nation.

I believe each of us has a responsibility to care for the elderly in our community. For the past twenty years, the IOA has done an exceptional job of doing just that. I hope San Franciscans will continue to support the IOA's important work and its plans for the new campus on Geary Boulevard.

Best wishes,

A handwritten signature in black ink that reads "Dianne Feinstein". The signature is fluid and cursive, with a large initial "D" and a long, sweeping underline.

Dianne Feinstein  
United States Senator

**The IOA has created numerous programs and services in ethnically diverse neighborhoods throughout the San Francisco Bay Area to help seniors age with dignity and independence. The programs are all inter-related with the common objective of providing the best level of service to seniors and their families.**

### **DAY HEALTH CENTERS**

The IOA's day health centers in the Richmond and Fillmore offer a caring, supportive environment where seniors participate in daylong programs that combine social and recreational activities with healthcare and physical therapy. Friendships, hobbies, current interests, and cultural traditions are nurtured by our multi-cultural staff. Diversity is valued by Russian-Jewish émigrés who actively keep up with current events in the former Soviet Union, Chinese seniors making banners to welcome the lunar New Year, and African American musicians presenting jazz concerts. A team of physicians, nurses, social workers, dieticians and therapists work together to provide expert care for seniors.



### **HOME CARE SERVICES**

The IOA's home care management programs provide seniors with the necessary support to live safely and comfortably in their homes, offering appropriate assistance in daily activities. The IOA money management service assists seniors with banking and bill paying, health insurance claims, organizing records for tax purposes and safeguarding assets.

### **TOLL FREE 24-HOUR FRIENDSHIP TELEPHONE LINE**

Dedicated staff, trained interns, and volunteers provide reassurance and support for older adults who may be lonely, bereaved, depressed or suicidal through the IOA's 24-hour toll-free telephone helpline called the Friendship Line. The Friendship Line was recently featured in a San Francisco Chronicle article, which highlighted the uniqueness of this crisis telephone service, the only one of its kind that focuses specifically on seniors.



### **ELDER ABUSE PREVENTION**

Recognizing that elder abuse takes many forms: physical abuse, psychological abuse, neglect, and financial abuse, the IOA conducts educational programs on recognition, intervention and prevention of elder abuse. Training programs are available for physicians, social workers, clergy, bankers, and law enforcement officers. Counseling and support groups are available to seniors who have been abused. Victims of abuse may also find safety in the City's emergency shelter, operated by the IOA.

## ART PROGRAMS

Led by professional artists from the community, art projects at the IOA range from painting and poetry to songwriting and theatrical productions and are designed to encourage creativity and self-expression.

## COMMUNITY HEALTH EDUCATION PROGRAMS

Specifically tailored to the needs of seniors, the IOA's Education Program offers more than 100 national and local workshops and seminars. Churches, apartment houses, and senior centers are some of the settings for these educational activities. The IOA also hosts classes and conferences at our different sites.

## PSYCHOLOGICAL SERVICES

Seniors dealing with feelings of grief, helplessness, anxiety, and depression may seek professional assistance and appropriate care through the IOA's psychological services. Comprehensive mental health services are available for older adults, their family members and partners.



## MEMORY IMPAIRMENT SPECIALIZED SERVICES

The IOA offers specialized daytime services for seniors with memory impairment, Alzheimer's Disease and other problems of intellectual function. Working in close collaboration with all other IOA services, we offer a comprehensive plan of care and follow-up.

## SPIRITUAL HEALING

The IOA realizes that one's faith and philosophy are important sources of strength and comfort in the face of the inevitable issues and questionings that arise with aging. We are developing a multi-faith Spiritual Healing Center, based on the model of the Bay Area Jewish Healing Center, in which this often neglected aspect of care and comfort can be called upon.

## GERIATRIC ASSESSMENT SERVICE

Comprehensive diagnosis and management planning is available for seniors with complex health problems and their families. Clients and concerned family members or caregivers receive a comprehensive evaluation of health status, memory and mood changes, and functional capacity and are provided with appropriate support services.

## RESEARCH

In partnership with UCSE, the IOA's research unit conducts clinical trials for people living with geriatric diseases such as Alzheimer's and Parkinson's disease. Studies are conducted in community settings to improve care, promote self-sufficiency for seniors and inform public policy on matters related to aging.



## USER FRIENDLY INFORMATION AND ADVICE

The IOA's multi-lingual staff provides answers for seniors who have questions about social services, financial assistance or help with finding affordable housing through our telephone information line.

# THE INSTITUTE ON AGING

## Statement of Activities For the Year Ended June 30, 2005

### STATEMENT OF ACTIVITIES

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#### REVENUES AND GAINS

Grants and Contracts	\$4,330,000
Contributions	2,597,000
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Total Public Support	\$6,927,000
Investment Income	129,000
Gain <Loss> on investments	115,000
Patient Service Fees	15,549,000
Other Revenue	280,000
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Total Other Revenue	\$16,073,000

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<b>Total Revenues and Gains</b>	<b>\$23,000,000</b>
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#### EXPENSES

Program Services:	
Multipurpose Senior Services	\$1,866,000
Research Center	581,000
Adult Day Health Center	2,176,000
SeniorHealth	12,400,000
Other Programs	3,000,000
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Total Program Services	\$20,023,000
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#### Management, General and Fundraising:

Management and General	1,706,000
Fundraising	593,000
Interest Expense	184,000
Investment Management and Custodial Fees	47,000
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Total Management, General and Fundraising	\$2,530,000
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<b>Total Expenses</b>	<b>\$22,553,000</b>
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<b>Changes in Net Assets</b>	<b>\$447,000</b>
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<b>Net Assets at Beginning of Year</b>	<b>\$5,713,000</b>
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<b>Net Assets at End of Year</b>	<b>\$6,160,000</b>
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# THE INSTITUTE ON AGING

## Statement of Activities For the Year Ended June 30, 2005

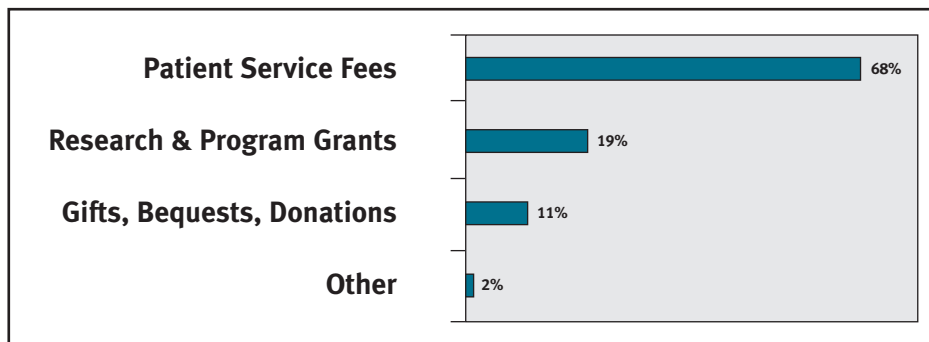
The Institute On Aging (IOA) is a California non-profit corporation exempt from federal and state income taxes.

Good & Fowler LLP of South San Francisco, California conducted an independent audit in accordance with generally accepted auditing standards for the year ended June 30, 2005.

### SOURCES OF PROGRAM REVENUE

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Patient Service Fees	68%
Research & Program Grants	19%
Gifts, Bequests, Donations	11%
Other	2%



### HOW WE SPENT OUR FUNDS

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Direct Services	73%
Fundraising	3%
Research	3%
Community Outreach and Education	13%
Administration	8%

