We are answering your call on aging.

Whether you or a loved one needs help because of physical challenges, a dementia diagnosis, or you simply have questions related to aging, the experts at Institute on Aging are just a phone call away. Our friendly, highly knowledgeable staff can connect you to top notch programs, services and resources within and outside of our agency, whether you have financial means or not.

Call Institute on Aging Connect: 415.750.4111

San Francisco
3575 Geary Boulevard
San Francisco, CA 94118
415.750.4111

Marin
930 Tamalpais Avenue
San Rafael, CA 94901
415.750.4111

Peninsula/South Bay
881 Fremont Avenue, Suite A2
Los Altos, CA 94024
650.424.1411

Santa Clara County
17666 Crest Avenue
Morgan Hill, CA 95037
408.474.0680

San Mateo County
1660 South Amphlett Boulevard, Suite 330
San Mateo, CA 94402
650.424.1411

Alameda County & Contra Costa County
2100 Embarcadero #101
Oakland, CA 94606
510.506.7127
Dear Friends:

We are delighted to share our reflections on last year’s accomplishments in our 2016-17 Annual Report. In this report you will see how we touched the lives of 20,000 seniors, their caregivers and families, and enabled them to continue to live with dignity in the place they call home. As the demand for our services continues to grow, we look to help seniors in need to “AgeOn” and live healthier, happier lives in our community through our services and advocacy.

This year saw The Institute on Aging’s professional staff on the frontlines, providing a listening ear to the rising number of lonely, isolated seniors who called in worried about their healthcare and benefits, bringing in creative arts specialists to engage clients with Alzheimer’s in our social day center programs, bathing, dressing and caring for hundreds of individuals who can’t leave their homes but want to stay in the place they are most comfortable, and training and educating others who want to learn how to care for loved ones or clients who are aging.

Looking forward, we see exciting opportunities to enhance our services. The San Francisco Department of Aging and Adult Services recently selected Institute on Aging to lead the effort to provide subsidies for home care for the middle income population. Research will begin to explore ways to evaluate and replicate our unique nursing-home-to-community transition program across multiple geographies through a newly awarded Sorenson Center Innovation grant. In addition, we are looking forward to meet the demand to expand our Program for All Inclusive Care for the Elderly in partnership with On Lok Lifeways and our Home Care services.

Thank you for being part of the IOA family. We look forward to another productive year together, taking care of the seniors in our community.

J. Thomas Briody
President and CEO

Looking forward, we see exciting opportunities to enhance our services. The San Francisco Department of Aging and Adult Services recently selected Institute on Aging to lead the effort to provide subsidies for home care for the middle income population. Research will begin to explore ways to evaluate and replicate our unique nursing-home-to-community transition program across multiple geographies through a newly awarded Sorenson Center Innovation grant. In addition, we are looking forward to meet the demand to expand our Program for All Inclusive Care for the Elderly in partnership with On Lok Lifeways and our Home Care services.

Thank you for being part of the IOA family. We look forward to another productive year together, taking care of the seniors in our community.

J. Thomas Briody
President and CEO
Program of All-inclusive Care for the Elderly (PACE) provides all-inclusive care for adults 55 or older, enabling older adults to continue living at home for as long as possible. The health plan features full medical care (both acute and long-term), prescription drugs, adult day care, personal care, physical therapy, transportation, and home care provided in partnership with On Lok Lifeways.

Integrated Behavioral Health Services are evidence-based interventions to address the symptoms of depression and anxiety with which many older adults struggle as they cope with changes related to aging. Therapies include problem-solving, mindfulness-based stress reduction, psychotherapy, reminiscence, cognitive behavioral therapy, and sleep coaching.

The Center for Elderly Suicide Prevention (CESP) offers counseling, grief support, and educational outreach to seniors, caretakers, and mental health professionals.

Friendship Line is a 24-hour, toll-free crisis intervention helpline for older adults nationwide who are isolated, lonely, depressed, bereaved, abused, and/or suicidal.

1970’s
- Mt. Zion Adult Day Health Center opens as the first community hospital-based agency to help frail and disabled adults remain at home

1980’s
- Institute on Aging incorporated as a non-profit organization
- Center for Clinical and Aging Services Research established
- Center for Elderly Suicide Prevention and Friendship Line founded

1990’s
- IOA and UCSF/Mt. Zion Center on Aging established
- IOA/On Lok Program of All-Inclusive Care for the Elderly (PACE) opens
- Geropsychology Program established with Mt. Zion Psychiatry

2000’s
- Swindells Center for Adult Day Services opens
- IOA Community Living Fund (CLF) established

2010 to Now
- Institute on Aging 3575 Geary site opens
- Dr. Patrick Arbore awarded the American Society on Aging’s Mental Health and Aging Award
Home Care and Support Services

**Home Care** includes personalized services from IOA's team of 380 insured and bonded home care workers for frail adults who need assistance with routine needs to be able to remain in their homes. Services may include meal planning and preparation, escorted transportation, errands, light housekeeping, companionship, personal care, and dementia and Alzheimer's care.

**Care Management** plans developed by IOA's skilled care managers target concerns including self-neglect, isolation, depression, injuries, medication, substance abuse, and home maintenance.

IOA’s Adult Social Day Program is structured, engaging activities five days per week for individuals struggling with early and later stages of memory loss and dementia, and those who are physically frail.

---

Community Education provided training to 12,000 medical professionals and community members. Community Living helped over 1,500 seniors remain at home. Home Care and Case Management Services supported over 130 clients a day and Fiduciary served over 130 clients.

---

Our PACE program supported over 350 clients and our Social Day Program served over 150 clients. Psychology and Counseling provided 800 counseling sessions. The Center for Elderly Suicide Prevention offered 180 grief support groups and educated over 7,000 people. The Friendship Line handled 156,000 calls this year.

---

Community Living Services

**Multipurpose Senior Services Program (MSSP)** is a care management program designed specifically for frail, low-income seniors (65 and older) who are nursing-home eligible, but with supportive services can continue living at home.

**Linkages** is a social work care management program that provides assessments and coordination of services for San Francisco adults with disabilities ages 18 or older.

---

**Community Living Solutions** are programs in San Francisco, San Mateo, and Santa Clara counties that assist individuals with limited incomes to transition out of nursing facilities and back to living independently. We coordinate with other local programs and services on our client’s behalf in a concentrated effort to help encourage independent living. We specialize in finding stable housing, access to community resources, and reliable health care services. Community Living Solutions also provide services to individuals living in the community who are at imminent risk of institutionalization.

---

Community Living helps over 1,500 seniors remain at home. Our PACE program supported over 350 clients and our Social Day Program served over 150 clients. Psychology and Counseling provided 800 counseling sessions.

---

**Home Care** includes personalized services from IOA’s team of 380 insured and bonded home care workers for frail adults who need assistance with routine needs to be able to remain in their homes. Services may include meal planning and preparation, escorted transportation, errands, light housekeeping, companionship, personal care, and dementia and Alzheimer’s care.

**Fiduciary Services** include bookkeeping and bill paying, court appointed conservatorships, durable power of attorney for finance, trusteeships, organization of client tax information, and representative payee.

---

Connect received 18,000 calls last year.
Volunteers

This year we welcomed over 300 volunteers who performed 21,966 hours of service.

Friendship Line – A dedicated team of 120 specially trained and supervised volunteers handled Friendship Line’s incoming and outgoing calls, creating community for isolated, lonely older adults and adults with disabilities.

And in August, the Friendship Line was honored by the San Francisco Giants as one of its 2016 AT&T Community All-Stars.

Corporate Volunteer Days – Corporate groups enjoyed the team-building experience of volunteer days at IOA, where they spent time getting to know our seniors in our Social Day Program.

Youth Groups – From preschoolers to high school community service clubs, IOA welcomed children and youth as volunteers in our adult day social program. School choruses and bands gained performance experience while entertaining program attendees.

Individual Volunteers – IOA is grateful to have ongoing volunteer commitments from people of all ages who help in our Social Day Program, and with Friendship Line. They socialize with seniors, leading art, movement, or music programs, or hosting special celebrations. One volunteer designed and painted a mural to install in our Social Day Program center. Our youngest weekly visitor, an instant celebrity with IOA clients, began coming to IOA with his mother last year at the age of six months.

Education and Advocacy

Elder Abuse Prevention Program (EAP) – Promotion of public awareness on elder abuse issues through training and education to seniors and professionals and advocacy for policies and services that increase safety for vulnerable adults.

Community Education – Educational forums provide information for the public and health professionals and promote healthier communities. We provide tools to inform important decisions on key topics pertaining to older adults and aging.

Internships – IOA helps to train the next generation of geriatric specialists by offering year-long internships for groups of both third-year and first-year students who are studying for Doctorates in Clinical Psychology at Bay Area colleges and universities. Students of psychology, social work, sociology, community health, and other related subjects complete mandatory community service hours through volunteer work with IOA clients.

Aging and Disability Resource Centers (ADRC) of San Francisco – With supervision provided by IOA, the 12 ADRC locations served 32,956 unduplicated seniors and 3,724 unduplicated individuals with disabilities this past fiscal year by providing the general public free information and assistance on issues affecting older people and people with disabilities, regardless of income.
New opportunities. New faces.

Institute on Aging (IOA) was selected as one of eight national winners of Sorenson Impact Center’s Pay for Success Competition. IOA will be awarded a $100,000 Social Innovation Fund Grant to evaluate and replicate the organization’s unique nursing-home-to-community transition program across multiple geographies.

“Since our founding in 1975, Institute on Aging has been a leader in developing innovative programs that serve as viable alternatives to nursing home placement.”

- Tom Briody
President and CEO
Institute on Aging

Institute on Aging welcomed four new board members in 2017

The Institute on Aging welcomed four new members with expertise in corporate finance, corporate management, legal matters, and gerontology to its Board of Directors.

Andy Fisher, of Portola Valley, was responsible for advising technology and growth companies on public and private capital-raising; Retired, Managing Director/Head of Technology Equity Capital Markets for Goldman Sachs & Co., San Francisco.

Anne Hinton, of Redwood City, has had a 40-year career developing programs and public policy related to older adults and adults with disabilities; Retired, Executive Director for Department of Aging and Adult Services, City and County of San Francisco.

Theresa Matacia, of Novato, CFA, is an accomplished and collaborative strategic and operationally focused finance executive, Interim CFO Anita Borg Institute.

Marlene Litvak, of San Francisco, most recently served as General Counsel and Vice President for Nikon Precision Inc. (NPI), a U.S. subsidiary of Nikon Corporation that is engaged in the semiconductor manufacturing industry.
Contributors

Our contributors helped us raise over $1.8 million dollars. A heartfelt thanks to all of you.

Platinum Heart
Archstone Foundation
Inger and Norbert Bischofberger
Crescent Porter Hale Foundation
Ray and Dagmar Dolby Family Fund
Hellman Foundation
Susan Koret
Maribelle and Stephen Leavitt
Joseph and Vera Long Foundation
Metta Fund
Mount Zion Health Fund
Barbra and Bernard Osher/The Bernard Osher Jewish Philanthropies Foundation
Ruth Ann Rosenberg
Sorenson Impact Center
Stupski Foundation

Diamond Heart
California Community Foundation
Gilead
Heritage on the Marina
SCAN

Gold Heart
Joseph L. Barbantielli and Marie and Manuel B. Perez Foundation
Meryl S. Brod and Len Weiss

Silver Heart
AT&T
Daniel Binder
Lynn Brinon and Daniel Cohn
Grete & J. Thomas Broady
Clare and James Davis
Karen and Andy Fisher
Mark Grace
Jewish Community Federation Senior Excursion Fund
David Lowenkopf
McKesson Foundation
John Osterweis
Kay and Abhay Parekh

Silver Heart (cont.)
Rotary Club of San Francisco
San Francisco Giants
Smart Family Foundation/Alicia Smart
Audrey and Robert Sockol
Sutter Health, California Pacific Medical Center
The Lawrence Weissberg Foundation

Bronze Heart
Linda Bonick-Davidson and William Davidson
Fumi and Aaron Cooperband
Adele Canvin
Davis Wright Tremaine, LLP
The Friend Family Foundation
Marcia and John Goldman
Mimi and Peter Hass Fund
James Hormel and Michael Nguyen
Kaiser Permanente
Gwen and John Kerner
Marlene Litvak and Bruce Fisher
Jeannee and Michael Martin
Clare Murphy
John Osterweis
Scott Seligman
Lisa Sabato and Matt Sansini
Kathryn and David Werdeger
Diana Whitehead
Woodruff-Sawyrs & Company
Amy and Thomas Zellerbach
Marjorie* and William* Zellerbach

* May their memories be a blessing
Our contributors helped us raise over $1.8 million dollars. A heartfelt thanks to all of you.

**Contributors**

Emerald Heart
Anonymous
Lynn Altshuler and Stanley Herzstein
Roxana and Daniel Blades
Lorraine Bosche
Steven Kay
Kit Rodgers
Patricia and Frederick Weissberg
Dr. Melissa Welch and Dr. Bruce C. Barker

Ruby Heart
Anonymous
The Benevity Community Impact Fund
Bethany Center for Senior Housing
C & R Building Services
Debbie Chernoff and Vincent Rocha
Joanne Cohen
Congregation Emunah-El
Dana Corvin and Harris Weinberg
Sandra and Conrad Donner
Joan Eichler
Episcopal Senior Communities
First Page Sage
Carl Gellert and Celia Berta Gellert Foundation
Green & Green, LLP
Judy and Jerral Harris
Herbst Foundation
Eve Heyman
Anne and John Hinton
Hometown Medical Supplies
Kaiser Permanente South Bay
Barbara and Ron Kaufman
Jo C. Kaufman
Alex Leff
Judith Lewis

Source of income

- Other Revenue: 3%
- Health Plan Revenue: 7%
- Fee for Service Revenue: 25%
- PACE Revenue: 40%
- Government Contracts: 21%
- Grants and Donations: 4%
- Contracts and Grants: 21%
- Revenue from Partnerships: 7%