A NOTE FROM TOM

As I reflect on the past fiscal year, I am proud to say that the Institute on Aging rose to the challenge of meeting the growing needs of our clients in the face of COVID-19. Prior to the pandemic, we were poised to expand with the opening of a new service line in San Diego for our nursing home transitions program and in conversations with other health plans to follow suit. But given the circumstances, we quickly pivoted to adjust our programs to ensure that the high level of support we provide to aging adults would not change, even if the delivery methods did.

IOA’s new Friendship Line California, funded by the California Department on Aging and dozens of donations from individuals and foundations, grew to new heights and awareness across the state. This vital program combats increased social isolation and loneliness by providing seniors across California with a toll-free phone line to connect with a caring, trained, listening ear. We expanded this important resource through an agreement with Humana Health of Louisville, KY to serve thousands of their members nationwide. In May 2020, IOA supporters again donated the needed funds to cover the rapidly increased costs for IOA caregivers on the frontlines visiting and caring for the most vulnerable and isolated seniors during the pandemic.

As we all know now, aging adults are among the most vulnerable to COVID-19. As this pandemic persists, IOA will continue to help seniors live safely in their own homes. IOA is a part of the solution and, together with our partners and supporters, will continue to develop new interventions and programs to ensure adults can age with dignity and purpose. In the current 2021 fiscal year, we will continue to launch even more programs to older adults in their homes, including the delivery of essential meals. We are also implementing plans to greatly expand and adapt our services for families living with dementia.

The outpouring of support from the community and our partners helped make all this work possible. From financial gifts to individuals volunteering their time, it was this support that enabled us to carry on through the pandemic. On behalf of everyone at the Institute on Aging, I want to thank you for your generosity in making all of this possible in these unprecedented times.

Sincerely,

J. Thomas Briody
President and CEO

IOA REVENUE 2020

- **53%** PACE, HEALTH PLANS AND HOSPITALS
- **24%** GOVERNMENT CONTRACTS
- **4%** GRANTS, DONATIONS
- **17%** CLIENT REVENUE
- **2%** OTHER
- **60%** **20%** **40%** **80%** **100%**
In 2020, 661 donors contributed over $2.5 million to the Institute on Aging. IOA is deeply grateful for the generous individuals, foundations, and corporations whose gifts help to advance our mission of enhancing the quality of life for aging adults and adults living with disabilities, enabling them to maintain their health, well-being, independence, and participation in the community.

**Philanthropic highlights**

- **FRIENDSHIP LINE**
  - IOA’s Friendship Line, the nation’s only accredited, 24-hour toll-free crisis intervention line for non-emergency emotional support calls serving older adults and adults living with disabilities, is a vital resource for the 7.8 million Californians aged 60 and older, many of whom live alone and/or without direct support from relatives and friends. Demand for our counselors has increased with the arrival of COVID-19 and the resulting host of emotional well-being issues. Thanks to the generous support of individuals, foundations, and the State of California, we more than doubled our staff to be able to provide a warm voice, a listening ear, and a human connection to those seniors feeling lonely and fearful.

- **AREAS OF SUPPORT**
  - **General Operations** 36%
  - **Capital** 24%
  - **Social Isolation** 20%
  - **Special Projects** 7%
  - **COVID Emergency Fund** 14%
  - **Dementia Care** 9%

- **MEALS DELIVERED EACH WEEK** 1,200
  - Throughout the pandemic, IOA has been delivering 180 meals per day, every day to Bay Area seniors.

- **INDIVIDUALS OUT OF INSTITUTIONS** 3,575
  - Community Living Solutions programs helped keep 3,575 individuals out of institutions and living in the community.

- **FRIENDSHIP LINE CALLS** 300,000
  - Friendship Line counselors took 300,000 calls speaking with isolated and lonely aging adults.
CARE FOR CAREGIVERS

This past spring, we shared the incredible story of our caregivers with IOA’s donors and friends. IOA caregivers visit our community’s most vulnerable, older adults with pre-existing conditions every day to ensure they are getting the care they need during this challenging time of COVID-19. Individuals donated nearly $32,000 to support the work of IOA’s caregivers and provide them with essential resources.

BENEFIT EVENTS

IOA’s 37th annual Dinner à la Heart took place on February 4, 2020 at St. Francis Yacht Club under the leadership of the event’s Auxiliary Board comprised of Irene Dietz, Roean Iscoff, Sandra Simon, Kathy Kaufman, Judith Presley, Audrey Sockolov, and Judy Williams. 400 guests gathered to honor longtime IOA supporter Rita Semel and raised more than $200K to support IOA’s programs to benefit seniors and adults living with disabilities.

Cable Car Caroling celebrated its 35th season on December 7, 2017. More than 550 carolers boarded holiday bedecked motorized cable cars and wound their way through the streets of San Francisco offering vocal merriment to over a 1,000 isolated seniors and adults living with disabilities at assisted living centers, skilled nursing facilities and private homes. Proceeds supported the IOA’s Friendship Line.
OPENING NEW POSSIBILITIES FOR DEMENTIA CARE

In September 2019, IOA proudly opened the doors of its new Enrichment Center at the Presidio, which serves as a centralized partner for support and emotional/mental health programs, healthcare providers, medical specialists, advocacy groups, and research organizations. IOA raised more than $2,000,000 from foundations and individuals to support the expanded resources and capacity offered by the Enrichment Center. We are profoundly grateful for the generosity of so many who share IOA’s vision of a future where no family has to face dementia alone.

As a long-valued partner of Institute on Aging and leader in investing in the health and well-being of San Franciscans, The Harry and Jeanette Weinberg Foundation provided a grant to IOA for the Enrichment Center at the Presidio. The Harry and Jeanette Weinberg Foundation’s grant supports more than the physical building; it is an investment in a new approach to caring for those living with dementia and their loved ones. We sincerely appreciate their grant, which is enabling us to launch our broader dementia strategy efforts.

Siblings Lisa Peters, Margaret Charnas, and Alec Peters provided critical support for constructing the Enrichment Center’s Patio in memory of their mother, Betty Peters. A longtime donor of IOA and dedicated fundraiser on behalf of many California non-profits, Betty most enjoyed spending her time outdoors – gardening, watching the ocean, and caring for her ranch. Her children’s gift is a fitting legacy for Betty, continuing her passion for philanthropy and sharing her love of fresh air. The Enrichment Center Patio provides seniors with an outdoor area to enjoy the Presidio National Park’s scenic beauty. This access to the outdoors is a vital part of a good quality of life, especially for those with dementia, and we are honored to remember Betty in this important space.

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FY20 DONORS

Thank you to all of our generous donors who supported our work last year. We are proud to recognize gifts $1,000 and above from July 1, 2019 to June 30, 2020.

PLATINUM HEART ($100,000+)
- City National Bank
- Marcia and John Goldman
- Susan Hirsch and Susan Leal
- Anne and John Hinton
- Innovative Project Solutions
- Interio Foundation Inc.
- Patricia and Randy Laubhan
- Moss Adams LLP
- Clare Murphy
- Michael Nguyen and James Horrem
- The Janet and Clint Reilly Family Foundation

DIAMOND HEART ($50,000+)
- Lynn Brinton and Daniel Cohn
- Ray and Dagmar Dolby Fund
- Estate of Kenneth Edlin
- Metta Fund
- Ruth Ann Rosenberg
- SCAN

GOLD HEART ($25,000-$49,999)
- Junior League of San Francisco
- Susan Koret and Jack Holland
- The Joseph and Vera Long Foundation

SILVER HEART ($15,000-$24,999)
- Joseph L. Barbonchiel Foundation
- Inger and Norbert Bischofberger
- Jewish Community Federation
- Smart Family Foundation

BRONZE HEART ($10,000-$14,999)
- J. Thomas Bridy Foundation
- Warren Browner, MD
- California Pacific Medical Center
- Julian S Davis, MD Lectureship Fund
- David Lowenkopf
- Jeannee and Michael Parker Martin
- San Francisco Rotary Foundation
- Kathryn and David Werdegar

EMERALD HEART ($5,000-$9,999)
- Linda Borick-Davidson and William Davidson
- Meryl S. Brad and Len Weiss
- Build Group
- Adele Corvin
- Dana Corvin and Harris Weinberg
- Davis Wright Tremaine LLP
- Jeanne Dinkelspiel
- John and Marcia Goldman Foundation
- Mimi and Peter Haas Fund
- Heritage on the Marina
- Kaiser Permanente
- Gwen and John Kerner
- Arlene and Stephen Krieger
- LIATIS Foundation
- Marlene Litvak and Bruce Fisher
- Lyft
- National Association of Area Agencies on Aging
- On Lok, Inc.
- John Osterweiss
- Palayam Foundation
- Fumi Tanaka-Cooperband and Aaron Cooperband
- The Lawrence Weissberg Foundation
- Woodruff-Sawyer & Co.
- Amy and Thomas Zellerbach

RUBY HEART ($2,500-$4,999)
- Lynn Altshuler and Stanley Herzstein
- Patrick Arbore
- Roxana and Daniel Blades
- Laine Buckingham and William E. Rothmann

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