

IMPACT

You can witness it in our clients' faces. You can experience it throughout our community. And, you can see it clearly reflected in our success measures.

Since beginning our bold strategic plan to make Silicon Valley the healthiest region in America, we have established equally bold 5-year outcomes. In each of our three initiatives—Healthy Living, Healthy Aging, and Healthy Communities—we are working strategically and diligently toward targeted outcomes. In Healthy Living, we want to see every neighborhood have access to locally grown produce within a mile's radius and every city have health policies in their general plans. In Healthy Aging, we aim to have coordinated leadership in place that changes attitudes and assumptions about aging and builds an effective delivery system; we are striving to have more older adults engage in evidence-based physical activity; and we aim to see more older adults able to remain in their homes because they are receiving effective nutrition and caregiver services. In Healthy Communities, our five year horizon will include more people with chronic conditions participating in effective self-management classes; an increased number of low-income residents appropriately utilizing free or low cost health and wellness services; and, more children receiving oral health services, including fluoridated water, with a resulting reduction in dental caries.

The data presented within this Annual Report reflects real incremental progress toward these crucial outcomes. We are proud of our success, but the success is made even more meaningful because we have not achieved it alone. We achieved the gains in large part because we spent time developing innovative and sometimes unconventional partnerships. We graduated the inaugural class of the Silicon Valley Health Corps who finished their year of service, as part of an expansive partnership between The Health Trust, AmeriCorps and 10 local organizations to bring fresh fruits and vegetables to local residents. We redoubled our commitment to senior nutrition when Councilmember Pete Constant reached across the aisle and joined forces with Supervisor Liz Kniss to help us advance the issue through a newly formed Senior Nutrition Task Force. None of these accomplishments would be possible without the committed philanthropic investments of our donors: to all our individual, corporate, foundation and government supporters, our deepest thanks. Your faith in our vision helps us deliver sustainable, positive change across diverse communities in Silicon Valley.

We hope you will read the next few pages and come away with a sense of enormous impact and an appreciation for the value we place on our partnerships.

Thank you for your continued support.



Frederick J. Ferrer
Chief Executive Officer



Richard P. Triolo, J.D.
2009-2010 Chair,
Board of Trustees

The Health Trust Financial Overview

Fiscal Year ended June 30, 2010

Statement of Financial Position

Assets:	
Cash and cash equivalents	1,817,000
Investments	91,495,000
Receivables and prepaids	
Fixed assets	9,118,000
Other assets	1,574,000
Total assets	\$104,004,000

Liabilities:	
Accounts payable	577,000
Grants payable	3,289,000
Other accrued expenses	1,560,000
Total liabilities	\$5,426,000

Net Assets:	
Unrestricted	97,988,000
Temporarily restricted	1,615,000
Permanently restricted	408,000
Total net assets	\$100,011,000
Total liabilities and net assets	\$105,437,000



Contribution to the Community

Dollars raised for Initiatives:	
Healthy Living Initiative	541,000
Healthy Aging Initiative	2,310,000
Healthy Communities Initiative	4,311,000
Total raised for Initiatives	\$7,162,000

Initiatives expenditures:	
Healthy Living programs and collaborations	656,000
Healthy Living grant making	854,000
Total Healthy Living expenditures	\$1,510,000
Healthy Aging programs and collaborations	2,406,000
Healthy Aging grant making	533,000
Total Healthy Aging expenditures	\$2,939,000

Healthy Communities programs and collaborations	4,868,000
Healthy Communities grant making	2,799,000
Total Healthy Communities expenditures	\$7,667,000

Other grants and Financial and Administrative Support Services (FASS)	\$1,195,000
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Total contribution to the community	\$13,311,000
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Wellness Champions (\$100,000 and up)

California State Office of AIDS
City of San José
Corporation for National and Community Service
Council On Aging
First 5 of Santa Clara County
Santa Clara County
Santa Clara Family Health Plan
Second Harvest Food Bank
Sobrato Family Foundation

Wellness Visionary (\$50,000 to \$99,999)

Microsoft Corp
Maria and Wim Roelands
The Pew Charitable Trusts
Tides Foundation - Convergence Partnership Fund
U.S. Department of Education
United Way Silicon Valley

Directors Circle (\$25,000 to \$49,999)

Anonymous
Consulate General of Mexico in San Jose
MAC AIDS Fund
Santa Clara County Social Services Agency
Santa Clara Family Health Foundation

Benefactors Circle (\$10,000 to \$24,999)

Academy of Friends
Adobe Systems
Hurlbut-Johnson Charitable Trust
Meals on Wheels Association of America
Orchard House Inc
Stephanie M. Rousseau
SCAN Health Plan
Silicon Valley Community Foundation

Investors Circle (\$5,000 to \$9,999)

Amici's Capital Corporation
Suzanne M. Avina
Charles B. Kuhn Memorial Fund
City of Campbell
City of Gilroy
City of Milpitas
City of Sunnyvale
Barbara J. Ferguson

Federal Emergency Management Agency
Frederick J. Ferrer
Barbara and Martin L. Fishman, M.D.
Douglas Ginter
Marianne Jackson
Monique H. Lambert, Ph.D.
Medtronic Foundation
Mission City Community Fund
National Charity League - Heritage Oaks
Pasta Pomodoro
Rotary Club of San Jose
Safeway Foundation
Richard Triolo
Wholesome Wave Foundation
Charitable Ventures
William H. Cliker Family Foundation

Patrons Circle (\$2,500 to \$4,999)

Ballet San Jose
BD Biosciences
Blue Shield Cares
Joe and Carolyn Booker
City of Mountain View
Ira and Karen Holtzman
Masami R. Iso
PETCO Foundation
Pointer Management Company
RBC Dain Rauscher
Peter Staple and Harise Stein, M.D.
The Estate of Raibeart Dixon
West Coast Marble & Granite
David and Janet Wilson

Leadership Circle (\$1,000 to \$2,499)

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Abbey Capital Managed Futures
Donald E. Allen
Amitabha Fund
James and Jane Asher
Banfield Charitable Trust
Bank of America Matching Gifts
John Bartlomiejczyk
Fred J. Bedard
Benton Medical Equipment
Robert J. Bettencourt
Roy and Dorothy Billings
Boucher Family Foundation
Michele Braucht

Barrett Brookhage
Michele Brown
Build-A-Bear Workshop Foundation
The John Robert Burgoon Memorial Endowment Fund
Calafia Cafe and Market A Go Go
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Dorothy Chen
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Reese and Kathleen Cutler
Ann and Alden Danner
The Davidson Family Foundation
Sharon Dunn
Enterprise Rent-A-Car Foundation
FaultLine Brewing Company
Charles and Janet Fee
Todd and Amy Hansen
Paul Hepler
Judy Heyboer
James and Diane Hutchison
Italian Men's Club of San Jose
Jocelyn K. Jackson
Chelsea Jongeward
David Katz and Ann Moses
Scott T. Leahy
Los Gatos Community Foundation
McDonnell Investment Management
MetWest
Michele Mork-Ovson
Hung Oliver Ng
Paolo's Restaurant
Les Persson
Wendy Petulla and Renee Faraj
The Plumed Horse
Cameron Prescott
Robert C. Quenelle
Cynthia and Allen Ruby
Santa Clara County Federal Credit Union
Saratoga Rotary Charitable Foundation
Joseph F. Sinnott, III
Susan W. Soo-Hoo
Raymond and Margaret Thiercof
Geoffrey H. Tootell, Ph.D.
Gary and Sharon Vergho

Westgate Church
World Runners
Donald and Gina Wu
64 Leadership Circle
Donor Circle (\$500 to \$999)
Adobe Systems Matching Gift Program
All Stars Helping Kids
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Anne Wakefield Atkinson Philanthropic Fund
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Larry R. Baer
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Madelaine M. Canham
Capers Eat & Drink
Charles F. Gagliasso Trucking, Inc.
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Cisco Systems Matching Gifts
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Roland and Kimberly Cortes
County of Santa Clara
Crimson Bistro
Sara Dominick
Bruce C. Edwards
El Camino Hospital
Extended Family Living Assistance Services
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Edson and Janice Kerswill
Nicole Kohleriter

Joseph Lattuada
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Race Street Fish & Poultry
Renegades
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Herbert H. Singh
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The Renaissance Handyman Charitable Trust
The Tippit Group
TWIST Café & Bistro
Natarajan and Sandhya Viswanathan
Viva Primavera
VIVE SOL
Nancy M. Waledisch
Leonard F. Walker
Marguerite Will
Sue Wuerflein
Frank and Susan Yeager

We regret that we could not list donors of less than \$500 due to space limitations, however we are deeply grateful for your support of our work. Donors listed here made donations July 1, 2009 to June 30, 2010. Every attempt has been made to ensure the accuracy of this list. Please contact The Health Trust at (408) 559-9385 or donations@healthtrust.org for any errors or omissions.

Thank You



Jardin de los Niños Qaxaqueno in Hollister, CA is a vegetable garden in Hollister for residents.



HEALTHTrust

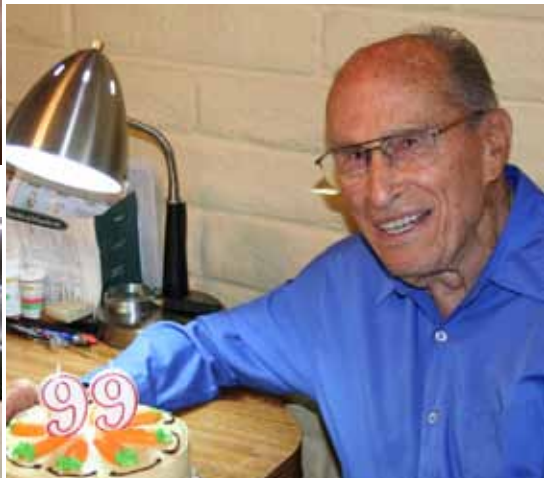
ANNUAL REPORT 2009-2010



LifeScan working together in building the shelving units for the food pantry and painting rooms for the Family Resource Center.



San Jose Mayor Chuck Reed, center, and Proclamation sponsor Councilmember Ash Kalra, left, presented a Proclamation to Health Trust CEO Frederick J. Ferrer during national Nutrition Month in March



Meals On Wheels client Louie Givich celebrates his 99th birthday.



Many children visit the Children's Dental Center for their routine checkups.



Jack Mackenroth, HIV advocate and star of Project Runway, was a special guest at the Red Ribbon Society event hosted by Frederick J. Ferrer and Ken Yeager.



The Health Trust and Second Harvest Produce partner to provide groceries to families in East San Jose.



Founded in 1996 as a charitable foundation, The Health Trust provides community health services, awards grants, and engages in policy and advocacy that support its vision and three strategic initiatives.

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Campbell, CA 95008
(408) 559-9385
www.healthtrust.org**

The Health Trust Board of Trustees 2009-2010

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HEALTHY LIVING

FY 2010 Impacts

- 32,000 pounds of fruits and vegetables produced for local consumption
- 9,000 youth and adults received garden or farm based education in healthy eating
- More than half of the children enrolled in eight-week or longer garden-based education reported increased fruit and vegetable consumption
- Three cities influenced to include policies supporting healthy living in their urban planning blueprints
- 5,600 people increased their awareness of healthy eating by reading *In Defense of Food* by Michael Pollan
- \$811,000 in community investments made to our grantee partners to promote healthy eating and physical activity



The Health Trust funded the Oaxacan Cultural Project to establish a community - designed and managed garden for families living in Hollister

Surgeon General David Satcher once said, "As we move to reform our health care system, it is critical to remember that improving the conditions in which people are born, grow, learn, live and age will have a greater impact on health than changes in medical care." This is the core philosophy behind our Healthy Living Initiative which seeks to make our community a place where healthy behavior—eating right and getting exercise—is also the easy thing to do. In this past year of great successes and big impact, we have done exactly that.

In 2010 we made great strides in encouraging local cities to develop plans that included walk and bike paths and community gardens as a fundamental component of their long term planning. We have worked tirelessly with our 11 community partners in the Silicon Valley Health Corps to dramatically increase the production and consumption of locally grown fruits and vegetables. Not only did local residents eat more healthy food as a result, a large number of children and people of all ages learned about the value of healthy eating, supporting healthy behaviors for a lifetime.

The impact of our work can be easily measured in pounds of produce harvested or the number of new city policies adopted. But spend some time at any of our partner's community gardens and you'll also see the impact on people's faces as they look proudly upon rows of freshly grown fruit and vegetables ready to be picked.

The Health Trust is an important ally, advocate and partner with the City Council in our development of public policies that help residents achieve healthier lifestyles.

- Sam Liccardo
Councilmember, City of San Jose

HEALTHY AGING

Older adults continue to be the fastest growing segment of our population and an important social and economic resource for Silicon Valley. Through our Healthy Aging Initiative, The Health Trust works to ensure older adults in our county spend more years in good health, engaged as vital members of our community. In 2010 we supported a groundswell of programs and led policy and advocacy efforts to do just that. We helped over 300 older adults receive best-practice based physical activity programs, which are proven to sustain improved mental and physical health. We served as a core leader of the Aging Services Collaborative, convening and connecting over 100 leaders from the public, private and nonprofit sectors to advocate for the wellbeing of older adults including senior nutrition. Hundreds of unpaid caregivers participated in the Caregivers Count! conference, learning about supportive resources for people like themselves caring for an aging loved one. And in addition to all this work, we still continued to provide over 100,000 high quality hot meals to homebound individuals through our well loved Meals On Wheels program. As the older



San Jose City Councilmember Sam Liccardo discussed the Senior Nutrition Program during the May 2010 Stand Up for Seniors Day of Action in San Jose

- 775 older adults received over 100,000 meals delivered to their home through our Meals On Wheels program. One hundred percent of clients noted the service was critical to their ability to remain in their home.
- 120 professionals in aging advanced their knowledge of evidence-based practices and aging in place models; and gained valuable insight about issues relevant to serving diverse populations
- 25,000 copies of *Healthy Steps* - a Silicon Valley wellness guide for adults age 50+ were printed and plans for community engagement to share this resource in Santa Clara and Northern San Benito counties

The Health Trust is taking the researched best practices in physical activity for older adults and making effective, real world opportunities available for local seniors.

- Nancy Whitelaw
Director, Center for Healthy Aging
The National Council on Aging

adult population grows, so does our impact. We're proud of the work we've done this past year to help older adults embrace more nourished, more active, more supported and more engaged ways of living.

FY 2010 Impacts

- Over 100,000 individuals were made more aware about the unique needs of caregivers
- Grants totaling over \$100,000 were made to nine local organizations to add or expand best practice physical activity programs for older adults. The vast majority of participants improved their fitness and balance and continue to be engaged in some form of physical activity

HEALTHY COMMUNITIES

No one person should suffer from poor health because of where they live, their income or the color of their skin. Yet statistics tell us otherwise, even right here in Silicon Valley. Through our Healthy Communities initiative, we offer programs and advocate for policy changes to support better health outcomes for everyone in our community. In 2010 our programs alone led to big impacts, especially for people living with HIV/AIDS, chronic illnesses including diabetes, and low income families in need of basic health screenings and health insurance. Over 800 residents living with HIV/AIDS received needed services. Hundreds successfully completed a course to learn how to better manage a healthy lifestyle with a chronic illness like diabetes. Thousands of low income families learned how to enroll their children in health insurance and how to access preventive care.

On the public policy front we made major strides, sponsoring legislation in Sacramento to make it possible for lower income Californians to receive chronic disease self management classes. We partnered with renowned national experts to promote the class nationwide with a new online class. And we partnered with the Pew Charitable Trusts to expand our work to secure community water fluoridation for San Jose, an enormous undertaking with proven health benefits for the young and the old.



The Children's Dental Center provides a healthy friendly environment for children as well as parents.

I am committed to improving the health of all Silicon Valley's residents and that is why I reached out to The Health Trust to help me develop legislation to help people living with chronic disease.

- Joe Coto
California Assemblymember

FY 2010 Impacts

- 2,459 individuals received education in prevention, screening, or completed a workshop to help them better manage a chronic illness.
- More than 87 percent of our HIV/AIDS clients who received case management routinely saw their doctor and took their medication.
- Hundreds of HIV/AIDS clients received assistance with transportation, securing stable housing and monthly groceries.
- Through our direct enrollment work and grant funding, over 10,000 children received health insurance coverage or care.
- Close to 7,000 children had more than 13,000 dental visits at the Children's Dental Center