

# IMPACT

Every day, in so many ways, The Health Trust is making Silicon Valley a healthier place to live – for today's residents and future generations. Our services reach thousands of people: homebound seniors who receive hot meals and warm smiles from our Meals On Wheels drivers; AIDS Services clients who have fresh food, safe homes and caring case managers; children who need affordable, top-quality dental care; uninsured people who rely on our Open Air Health Fair for their annual health screenings. Through our \$2.65 million investment in the work of our grantees, we are affecting the lives of thousands more, whether by making fresh produce available to more families, promoting physical activity for seniors or building healthier neighborhoods for all residents.

Even as we serve the needs of our community today, our efforts to change public policy assure that The Health Trust's impact will be felt for years to come. Over the past year, we led a campaign to rewrite San Jose's laws to increase farmers' markets and other healthy food outlets in underserved areas of the city. We achieved a major victory in our five-year effort to bring fluoridated water, one of the most significant public health advances of the 20th century, to San Jose when the Santa Clara Valley Water District voted unanimously to make fluoridation its policy. Through Destination: Home, we championed efforts to end chronic homelessness by providing permanent housing and services to those who have lived for years on the streets, saving lives and public dollars.

But real and lasting change takes more than one organization; it takes a community. That's why The Health Trust brought Disruptive Innovation theory to Silicon Valley's nonprofit community. In a day-long seminar led by Disruptive Innovation guru Clay Christensen, we challenged service providers to rethink the way they operate in this age of increasing need and dwindling resources. Through grants and continuing programs, we hope to inspire nonprofits to discover smarter, simpler, more cost-effective ways of providing the services our community can't do without.

These are difficult times throughout our nation and the world, and we know that our community increasingly depends on The Health Trust to meet the needs of our most vulnerable residents – the poor, the elderly, children and those with chronic diseases. We cannot do this important work without our valued partners, our dedicated volunteers and our generous donors. We appreciate our many individual, foundation and corporate supporters, who make it possible for us to advance wellness and equity in Silicon Valley.



**Frederick J. Ferrer**  
Chief Executive Officer



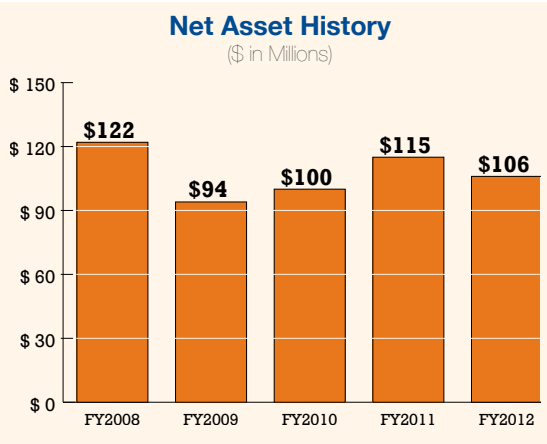
**Kathy McCarthy, J.D.**  
2011-2012 Chair,  
Board of Trustees

## The Health Trust Financial Overview

Fiscal Year ended June 30, 2012

### Statement of Financial Position

<b>Assets:</b>	
Cash and cash equivalents	\$ 2,827,000
Investments	95,475,000
Receivables and prepaids	1,683,000
Property and equipment, net	2,272,000
Other assets	7,699,000
<b>Total assets</b>	<b>109,956,000</b>
<b>Liabilities:</b>	
Accounts payable	526,000
Grants payable	1,610,000
Other accrued expenses	1,483,000
<b>Total liabilities</b>	<b>3,574,000</b>
<b>Net Assets:</b>	
Unrestricted	102,097,000
Temporarily restricted	3,924,000
Permanently restricted	361,000
<b>Total net assets</b>	<b>106,382,000</b>
<b>Total liabilities and net assets</b>	<b>\$ 109,956,000</b>



### Statement of Activities

<b>Revenue:</b>	
Public support	\$ 6,926,000
Fee for service and other fees	2,439,000
Net investment and other revenues	(1,468,000)
<b>Total support and other revenues</b>	<b>7,897,000</b>
<b>Expenses:</b>	
Healthy Living (incl. grants)	2,340,000
Healthy Aging (incl. grants)	2,495,000
Healthy Communities (incl. grants)	6,906,000
Financial Administrative Support Services	1,587,000
<b>Total Initiative expenditures</b>	<b>13,328,000</b>
Management and general	2,292,000
Fundraising	549,000
<b>Total support services</b>	<b>2,841,000</b>
<b>Total expenses</b>	<b>16,169,000</b>
<b>Change in net assets</b>	<b>\$(8,272,000)</b>

### Wellness Visionary

\$500,000 and up

FIRST 5 Santa Clara County  
City of Campbell  
City of Gilroy  
City of Milpitas  
City of Mountain View  
City of Sunnyvale

### Wellness Champions

\$100,000 to \$499,999

The California Wellness Foundation  
City of San José  
City of San José HOPWA SPNS  
Corporation for National and Community Service

Council on Aging Silicon Valley  
County of Santa Clara Social Services Agency  
David and Lucile Packard Foundation

Destination: Home  
Jockers Family Foundation  
El Camino Hospital  
The SCAN Foundation  
United Way Silicon Valley

### Director's Circle

\$25,000 - 99,999

Adobe Foundation  
Cadence Design Systems, Inc.  
Circle of Life Senior Endowment Fund, an advised fund of the Silicon Valley Community Foundation

Consulate General of Mexico in San José  
The Estate of Jack Winchester  
HEDCO Foundation  
Kaiser Permanente

M\*A\*C AIDS Fund  
Judy and George Marcus  
Orchard House, Inc.  
SanDisk Corporation Fund

### Benefactor's Circle

\$10,000 - \$24,999

Anonymous  
Elsie & Josephine Colombo Charitable Trust  
Falko Fortbrich  
Glead Sciences

Nancy Handel  
Huribut-Johnson Fund, an advised fund of the Silicon Valley Community Foundation  
TeleNav, Inc.

### Investor's Circle

\$2,500 to 9,999

Amici's East Coast Pizzerias  
Amitabha Buddhist Society of USA  
Anonymous

Aruba Networks Foundation  
Ms. Suzanne M. Avina  
Byca and Darla Beck  
Blue Shield of California

Broadway Cares/Equity Fights AIDS  
Michele Brown  
The Burt and Barbara Foundation

### CareMore Foundation

City of Campbell  
City of Gilroy  
City of Milpitas  
City of Mountain View  
City of Sunnyvale

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Blue Shield of California

Broadway Cares/Equity Fights AIDS  
Michele Brown  
The Burt and Barbara Foundation

# Thank You

### Wellness Visionary

The Carter Family Charitable Foundation, Inc.  
Anthony and Mary Cefalu  
ChaseVP  
Jerome Chester  
Cisco Foundation  
Cisco Systems

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### Wellness Visionary

BD Biosciences  
Marvin Bells  
Shelley Brown  
Stephen and Cheryl Caplan  
Chacho's Restaurant  
Felix and Helen Charpentier  
Ashley Cobb

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### Wellness Visionary

Stephen and Christine Sedler  
Irene Segura  
Betty Siemens  
Ramona Singh  
Robert Smart

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Meals On Wheels volunteers like Kristy Cook provide hot meals and daily visits to homebound seniors and disabled people throughout Santa Clara County.



# HEALTHTrust

## ANNUAL REPORT 2011-2012



Chef Nick Difu welcomed Health Trust CEO Frederick Ferrer and San Jose Mayor Chuck Reed to Nick's on Main in Los Gatos for Dining Out For Life.



Health Trust Trustee Charles Bullock, left, discussed issues facing the nonprofit community with Prof. Clay Christensen at the Disruptive Innovation Summit.



Destination: Home is helping chronically homeless people like Reggie find permanent housing.



Norma and her daughter Crista enjoy the fresh fruits and vegetables they receive at The Health Trust produce van.



The Health Trust's new San Jose headquarters is the organization's first permanent home.



FIRST 5 CEO Jolene Smith and Sunnyvale Mayor Tony Spitaleri celebrated the opening of the Fairwood Family Resource Center.

### The Health Trust Board of Trustees 2011-2012

Kathy McCarthy, J.D., Board Chair	Michael Celio, J.D.	David Katz, M.A., M.B.A.
Roberta L. Robins, J.D., Board Vice Chair	Cindy Chavez	Ruma Kumar, M.D.
Cindy Ruby, Board Secretary	Karen Danna	Emily Lam, M.P.P.
Juan A. Benitez	Frederick J. Ferrer, M.S.	Monique H. Lambert, Ph.D.
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Darren A. Cde Baca, C.I.M.A., C.F.P.	Marianne Jackson, M.A.	



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.

**3180 Newberry Drive, Ste. 200  
San Jose, CA 95118  
(408) 513-8700  
www.healthtrust.org**



The Healthy Communities Initiative strives to improve the health of vulnerable populations, including people living with HIV/AIDS and uninsured immigrants.

The Healthy Aging Initiative is empowering older adults to live fuller, healthier lives by eating right, staying active and advocating for the services they need.

The Healthy Living Initiative is fighting obesity by increasing the consumption of fresh fruits and vegetables in targeted neighborhoods throughout Silicon Valley.

## HEALTHY COMMUNITIES

**P**reventing cavities. Preventing HIV/AIDS. Preventing chronic homelessness. These are just some of the ways the Healthy Communities Initiative is bringing better health to underserved populations in Silicon Valley. FY 2012 brought an important victory in The Health Trust's battle against health disparities when the Santa Clara Valley Water District board voted unanimously to fluoridate its water supply. The historic vote marked the culmination of a five-year campaign led by The Health Trust. Once local retailers adopt and implement pro-fluoride policies, San Jose no longer will be the largest city in America without this basic public health benefit, which reduces tooth decay in children by up to 40 percent. The Health Trust AIDS Services continued to provide housing, case management, food and other services to more than 800 low-income people living with HIV/AIDS. At

the same time, the Healthy Communities Initiative launched an effort to stop the spread of the virus by promoting safe sex and STD testing to local gay and bisexual men over the web. N2MEN.ORG, which debuted in August 2011, offers frank, accurate information about gay men's health, as well as STD and HIV testing information in Silicon Valley. Destination: Home, with its Housing 1000 partners, launched an innovative crowdfunding campaign called Housing ONE, which puts a face on the crisis of chronic homelessness in Santa Clara County. Donors can read stories of homeless individuals online and help them transition to permanent housing by providing funding for basic household furnishings. Launched in March 2012, Housing ONE generated donations totaling over \$6,000 in its first six months.

### 2012 Impacts

- 416 individuals received health screenings at our Open Air Health Fair, which was attended by an estimated 3,000 people at the Berryessa Flea Market.
- 389 adults participated in Chronic Disease Self-Management classes and 21 community members were certified to provide CDSM courses.
- 1,372 people attended 41 Positively Speaking HIV/AIDS presentations at local high schools and colleges.
- 2,505 children and 670 adults attended 119 oral health education presentations at schools and in homes.
- 5,746 children were enrolled in health insurance programs.

**A**s the fastest growing segment of the population in Santa Clara County, older adults need a stronger voice in decisions that affect their health and ability to live independently. In line with its goal of making Silicon Valley a place where people can age with dignity, the Healthy Aging Initiative and its partners spoke up for seniors in FY2012 and mobilized seniors to speak up for themselves. Working with the Aging Services Collaborative (ASC), we advocated for a Seniors Agenda for Santa Clara County and gained support from elected leaders for three important public policy goals: preserving public funding for safety net senior programs, improving transportation options and promoting

long-term services and supports. To raise awareness about the needs of caregivers, we held a caregivers conference with the ASC for nearly 200 participants and commissioned a report on caregivers in the county. Working with communities across California, we are building a movement to create a system of care in which people can grow old with dignity in their communities. We recruited more than 100 older adult volunteers through AGents for Change and trained them in advocacy, leadership and social media. AGents were effective advocates for pedestrian safety and senior nutrition funding, and were active participants in shaping the County's Seniors Agenda.

### 2012 Impacts

- 28,000 *Healthy Steps Silicon Valley* booklets in English, Spanish and Chinese were distributed by 90 volunteers in partnership with 260 organizations.
- 67,137 hot meals were delivered to 508 homebound elderly and disabled clients through The Health Trust's Meals On Wheels program.
- 31 locations and 17 agencies offered evidence-based physical activity programs through the Silicon Valley Healthy Aging Partnership, a Health Trust grantee.
- 615 clients received information and assistance from trained Senior Peer Advocates (SPA), a Health Trust project.

## HEALTHY AGING

**P**utting healthy, fresh fruits and vegetables on the table should be possible for all families in Silicon Valley. That's why the Healthy Living Initiative took on a major public policy effort in FY2012 to eliminate policy barriers that inhibit the expansion of farmers' markets, community gardens and mobile produce vending, especially in San Jose's underserved neighborhoods. As leader of the Campaign for Healthy Food San Jose, a coalition of government and nonprofit partners, The Health Trust worked with San Jose city departments to enact a new farmers' market ordinance which eliminates high fees and red tape for smaller markets located on private property.

The ordinance requires these Certified Farmers' Markets to accept CalFresh (food stamps.) The campaign also helped the city advance policies that make it easier to establish community gardens on public land. The Campaign laid the groundwork for Fresh Carts Silicon Valley, an innovative mobile produce vending program that will provide healthy food and create jobs in low-income neighborhoods. Partners in the Campaign included the City of San Jose, FIRST 5 Santa Clara County, Pacific Coast Farmers' Market Association and Working Partnerships USA. The work was funded by the Santa Clara County Public Health Department through a federal Communities Putting Prevention to Work grant.

### 2012 Impacts

- 2,593 children, including 1,591 identified as high-need beneficiaries, participated in garden-based education programs conducted by The Health Trust's Silicon Valley HealthCorps.
- San Jose and Mountain View adopted general plans that include the strongest health elements in the country, aimed at creating environments that promote physical activity and access to healthy food.
- 79,587 pounds of fresh fruits and vegetables were grown for local consumption by Health Trust grantees.

## HEALTHY LIVING