Mayor Sam Liccardo and the City of San Jose made the City’s suite available to All The Way Home, and hosted recently housed veterans for Game 4 of the Stanley Cup Final.

For its 11-year anniversary, the Applied Materials Silicon Valley Turkey Trot continued its support of Better Choices, Better Health, a chronic disease self-management program.

The Health Trust and oral health partners welcomed California State Dental Director Dr. Jay Kumar. In attendance were representatives from FIRST 5 Santa Clara County, Santa Clara County Public Health Department, San Jose Water Company, Santa Clara Valley Water District, and Councilmember Magdalena Carrasco.

As a proud supporter and funder, The Health Trust joined in celebrating the grand opening of Educare California at Silicon Valley, an early learning center aimed at preventing the achievement gap for children ages 0 to 5.

Santa Clara County Supervisors Cindy Chavez and Joe Simitian helped ring in the inaugural Health Trust World AIDS Day Gala, celebrating the HIV/AIDS community in Silicon Valley.

Funded by FIRST 5 Santa Clara County’s Learning Together Initiative, the Rita Chavez Family Resource Center opened this year in East San Jose, offering free programs to strengthen families and provide a healthy start to children.

Santa Clara County Supervisors Mike Wasserman and Dave Cortese and Frederick J. Ferrer, CEO of The Health Trust, are joined by representatives from the County of Santa Clara, and leaders from Abode Services, Google, and the Irvine Foundation to launch Project Welcome Home, California’s first Pay for Success endeavor, that provides housing and supportive services for the chronically homeless and aims to improve quality of life and reduce reliance on costly government services.

Funded by FIRST 5 Santa Clara County’s Learning Together Initiative, the Rita Chavez Family Resource Center opened this year in East San Jose, offering free programs to strengthen families and provide a healthy start to children.

Santa Clara County Supervisors Cindy Chavez and Joe Simitian helped ring in the inaugural Health Trust World AIDS Day Gala, celebrating the HIV/AIDS community in Silicon Valley.
This year, the Healthy Aging Initiative continued its leadership in community efforts supporting older adults. **AGEnts for Change** served on the Steering Committee of San Jose’s successful effort to obtain Age Friendly status from the World Health Organization and provided ongoing advocacy on the two-year action plan to implement Vision Zero, San Jose’s traffic safety plan.

To further encourage physical activity, The Health Trust spearheaded **Senior Safari Walkabout**, an exercise event series, in partnership with Happy Hollow Park & Zoo and its Foundation. Seniors enrolled in **Digital Aging Mastery**, a program teaching older adults how to use tech and social media to avoid isolation and encourage virtual interaction, graduated together and celebrated their newfound connectivity. **Better Choices, Better Health**, a chronic disease self-management program, taught 600 individuals how to self-manage their chronic disease.

The Healthy Aging Initiative ensures that all older adults are able to advocate for themselves and that they have access to coordinated healthcare and supportive services.
The Healthy Living Initiative ensures that health-related policies and services exist so that race, language, income and age do not keep residents from enjoying the healthiest lives possible.

Our Open Air Health Fair offered health screenings and flu shots to uninsured individuals and families at The San Jose Flea Market.

1661 clients enrolled in programs designed to strengthen families and support children’s successful entrance into kindergarten.

10,120 participants received nutrition education, including My Plate, Rethink Your Drink and Healthy Eating on a Budget.

60,000+ people served by 139 employees at The Health Trust.

28,857 children received oral health prevention and dental services.

The Healthy Living Initiative planted the seed of good health for individuals and families alike. Funded by FIRST 5 Santa Clara County, The Health Trust Family Resource Centers opened a new location to provide additional free family-strengthening workshops, and in a huge milestone, began to offer parenting workshops to incarcerated parents at Elmwood Correctional Facility. To ensure family wellness, The Health Trust also provided Health Insurance Enrollment assistance to over 5,000 individuals. In the face of a widespread and pervasive homeless crisis, The Health Trust expanded its Housing Services to provide intensive case management to an additional 175 clients who were chronically homeless. Housing Services was also awarded a pilot program to further its work with HIV/AIDS clients. Destination: Home launched “All The Way Home,” a campaign to end veteran homelessness in Santa Clara County by Veterans Day 2018.

Hike & Bike, an AIDS Services fundraising event, brought together health advocates, HIV/AIDS supporters, and community members at Hellyer County Park to participate in a 5K walk or 30-mile bike ride.
Under the Healthy Eating Initiative, The Health Trust in partnership with the Silicon Valley Leadership Group Foundation brought over 100 salad bars to schools in Santa Clara County. Bringing food access to the forefront with our release of Food for Everyone, a solutions-driven assessment detailing food inequities for low-income seniors and individuals that are homeless, The Health Trust formed a taskforce, made up of key community leaders and organizations, to ensure its findings and recommendations result in actionable solutions. Continuation of food support through The Jerry Larson FOODBasket has brought hundreds of thousands of pounds of fresh produce, much of which was locally sourced, to our clients living with HIV/AIDS and families in our Family Resource Centers. Expansion of Good. To Go. outlets, now at 24 locations, and the release of our Good. To Go. mobile app, has furthered community awareness and access to healthy, local food options.
Making Health Accessible

Over the past few years we’ve tackled our Valley’s toughest health challenges by focusing our work through three initiatives: Healthy Living, Healthy Aging, and Healthy Eating. As a result, we’ve made significant progress in making Silicon Valley healthier for everyone.

This year, Our Good. To Go. campaign, Healthy Cornerstores, Fresh Carts, and support of mobile Farmers' Markets and Salad Bars to Schools has drastically increased the accessibility and consumption of healthy food.

AGEinists for Change and Senior Peer Advocates (SPA) programs have given seniors the tools to advocate for policies and to receive services that help them age well.

This year we expanded our Housing Services to house more people who were homeless and help them live healthier lives. We increased the number of Family Resource Centers we operate and expanded our work to Elmwood Correctional Facility to help parents raise healthy children.

Our release of Food for Everyone, a comprehensive assessment of healthy food access among low-income seniors and individuals that are homeless in San Jose, painted a vivid picture of the food insecurities these populations face. But it also presented us with the information we need to drive informed decision making by policymakers and food providers in order to maximize resources in the effort to end food insecurity and increase food access to seniors and individuals that are homeless.

To date, we’ve formed a Food Access Implementation Task Force, consisting of City and County officials, and nonprofit partners, that is charged with ensuring that the findings of Food for Everyone result in actionable solutions.

As we move forward, we will continue to help our region's most vulnerable communities by solving root problems that create lasting change and significantly improve health in Silicon Valley.

Ensuring that the forgotten are empowered, that the voiceless are heard, that the homeless are housed, and that the hungry are fed will be what we charge ourselves to accomplish and the measure by which we will hold ourselves accountable.

As always we recognize that our work is only possible with a dedicated, talented and mission-driven staff coupled with key government and nonprofit partners. All of which rely on the generous investments by our donors and volunteers.

Making health accessible for everyone will come with its challenges, but together we are prepared to tackle these challenges head on.

We hope you’ll join us.

Frederick J. Ferrer
Chief Executive Officer

Dr. Charles Bullock
2015-2016 Chair,
Board of Trustees

The Health Trust Financial Overview
Fiscal Year ended June 30, 2016

Consolidated Statement of Financial Position

<table>
<thead>
<tr>
<th>Assets:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$2,191,000</td>
</tr>
<tr>
<td>Investments</td>
<td>89,316,000</td>
</tr>
<tr>
<td>Receivables and prepaids</td>
<td>2,504,000</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>5,629,000</td>
</tr>
<tr>
<td>Other assets</td>
<td>7,770,000</td>
</tr>
<tr>
<td>Total assets</td>
<td>$107,410,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Liabilities:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts/Grants payable</td>
<td>525,000</td>
</tr>
<tr>
<td>Other accrued expenses</td>
<td>1,408,000</td>
</tr>
<tr>
<td>Total liabilities</td>
<td>$1,933,000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Assets:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Unrestricted</td>
<td>102,696,000</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>2,610,000</td>
</tr>
<tr>
<td>Permanently restricted</td>
<td>171,000</td>
</tr>
<tr>
<td>Total net assets</td>
<td>105,477,000</td>
</tr>
</tbody>
</table>

Net Asset History
($ in Millions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Net Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 2012</td>
<td>$106</td>
</tr>
<tr>
<td>FY 2013</td>
<td>$112</td>
</tr>
<tr>
<td>FY 2014</td>
<td>$121</td>
</tr>
<tr>
<td>FY 2015</td>
<td>$116</td>
</tr>
<tr>
<td>FY 2016</td>
<td>$105</td>
</tr>
</tbody>
</table>

Consolidated Statement of Activities

Revenue:
Public support                           $10,852,000
Fee for service and other fees          3,761,000
Net investments and other revenues    (4,126,000)
Total support and other revenues       10,487,000

Expenses:
Healthy Living (incl. grants)              11,606,000
Healthy Aging (incl. grants)               2,875,000
Healthy Eating (incl. grants)              1,893,000
Financial Administrative Support Services | 2,615,000
Total programatic expenditures           18,989,000
Management and general                     2,167,000
Fundraising                                335,000
Total support services                     2,502,000
Total expenses                            21,491,000
Change in net assets                      (11,004,000)
The Health Trust is a strategic agent of change. We embrace San Jose’s rich history of diversity and community organizing as well as the innovation and business savvy of Silicon Valley’s tech sector. We set high standards for ourselves and our partners as we look to assure the accuracy of this list and we apologize for any inadvertent errors or omissions.

July 1, 2015 and June 30, 2016.

Gifts of all levels are critical to the success of our work and we thank all our donors for their generous support. Due to space limitations, this list includes donors who contributed at the level of $500 or more between 

$1,000 - 2,499

Wells Fargo

Investor’s Circle

$2,500 - 9,999

Enterprise Holdings Foundation

FASS - Financial Administrative Support Services

Helen L. Fuller

Sally J. Fong Family Fund

Philip and Junko Freidin

Gilroy Foundation

John S. & James L. Kraft Foundation

Kieve Foundation

Michael and Ina Korek Foundation Trust

Delores Lawrence

LMI LAW LLP

Steve Lopez

Los Gatos Community Foundation

Meals on Wheels America

Jeffery Motto

Pacific Gas and Electric

Randall M. Presuhn

Carlos M. Puig

Roberta Robins, J.D.

Richard T. Rowley and Janet L. Eklund-Rowley

Philip Schmit

Robert N. Singer Foundation

Susan W. Scofield

Star One Credit Union

TOSA Foundation

Sandra Tullis

University of California Berkeley

Trang Van

Gary and Sharon Vergho

VMC Foundation

Frank and Susan Yaeger

Donor Circle

$500 - 999

Edwin Aiken

Donald and Elizabeth Allen Family Fund

David A. Benezra Memorial Foundation

Roy and Dorothy Billings

Michelle Brown

The Carter Family Charitable Trust

Anthony and Mary Cefalu

Jerome Chester

William and Sandra Cooper

Reese and Kathleen Cuerer

Gordon and Carolyn Davidson

Louise De Putron

Tune Dolcena

Andrea S. Elliott

ESisenberg

Joe and Carolyn Bookor

John Robert Burgoon Memorial Endowment Fund

Mario Bunnas

Jan Busbee

Paul Canfield

Rowland and Dawn Chase

Ching Huang Cheng

William H. Giler Family Foundation

Ashley Cobb

William Cornel

Robert M. Del Vecchio

Ernest and Cecilia Echavara

Dorothy G. Ellis

W. J. Emerson

Lynda and Stephen Fox, M.D.

Lance Freese

Google, Inc.

Brian and Carolyn Halla

Ben Hardcastle

Heppy Trust

Deborah Higgins

Michael Hirshara

Peter A. Hooper

Jocelyn K. Jackson

Teresa Johnson

Marshia N. Jones

Marsha N. Jones

Jocelyn K. Jackson

Peter A. Hooper

Jocelyn K. Jackson

Marianne Jackson, M.A.

Michael Celio, J.D.

David Katz

The Health Trust is a strategic agent of change. We embrace San Jose’s rich history of diversity and community organizing as well as the innovation and business savvy of Silicon Valley’s tech sector. We set high standards for ourselves and our partners as we look for new solutions to the complex challenges of local health inequities.

Unlike most foundations, “funder” is not The Health Trust’s only role; we also provide direct services, build community partnerships, advocate for policy change, raise money, and lead new initiatives. We are willing to do whatever is needed to implement our strategic vision and turn the hope of health for all into a reality in Silicon Valley.

The Health Trust Board of Trustees 2015-2016

Charles Bullock, Ph.D., Chair

Robert L. Robins, J.D., Vice Chair

Cindy Ruby, Secretary

Craig Capuro

Damian A. Calle Baca, C.M.A., C.F.P.

Darrin A. Calle Baca, C.M.A., C.F.P.

David Neighbors, C.P.A.

Emily Lam, M.P.P.

Frederick J. Ferrer, M.S., CEO

Jim Heirwagen, B.S.C.

Marilane Jackson, M.A.

Michael Celio, J.D.

W. J. Emerson

Lynda and Stephen Fox, M.D.

Lance Freese

Google, Inc.

Brian and Carolyn Halla

Ben Hardcastle

Heppy Trust

Deborah Higgins

Michael Hirshara

Peter A. Hooper

Jocelyn K. Jackson

Teresa Johnson

Marshia N. Jones

Marsha N. Jones

Jocelyn K. Jackson

Peter A. Hooper

Jocelyn K. Jackson

Marianne Jackson, M.A.

Michael Celio, J.D.

David Katz

The Health Trust is a strategic agent of change. We embrace San Jose’s rich history of diversity and community organizing as well as the innovation and business savvy of Silicon Valley’s tech sector. We set high standards for ourselves and our partners as we look for new solutions to the complex challenges of local health inequities.

Unlike most foundations, “funder” is not The Health Trust’s only role; we also provide direct services, build community partnerships, advocate for policy change, raise money, and lead new initiatives. We are willing to do whatever is needed to implement our strategic vision and turn the hope of health for all into a reality in Silicon Valley.