OUR MISSION

To build health equity in Silicon Valley.

We tackle health disparities plaguing the most vulnerable populations in our community by aligning our roles as a funder, a provider, and an advocate to impact health-related services, systems, and policies.

As a Funder
We award grants to community-based organizations and community initiatives that are building health equity. We amplify our role as a grantmaker by partnering with other like-minded funders.

As a Provider
We provide direct services to vulnerable community members. Our services are tried-and-true, evidence-based, and often not provided by other local community-based organizations.

As an Advocate
We champion systems and policy changes that align with our mission. We amplify our role as a bold policy advocate by partnering with government officials, local leaders, and community-based organizations to catalyze change on a broader, county-wide level.

Because everyone’s health matters.
Narrowing Our **Focus to Maximize Impact**

We spent the greater part of Fiscal Year 2018 reflecting upon our impact in the community and refining our strategic direction. This process drew upon input from community members, funding partners, collaborating organizations, staff, and our Board of Trustees, as well as research and data from our programs and external sources.

This reflection culminated in a more focused strategic direction that aligns our roles as a funder, a provider, and an advocate to build health equity in Silicon Valley.

Over the next five years, we look to maximize our impact by focusing our efforts on:

- **Improving Health Through Food**
- **Making Chronic Diseases More Preventable & Manageable**
- **Prioritizing Health In Housing**

We believe that focusing our efforts in these three areas will improve the health of vulnerable populations in our community: older adults, recently housed individuals, and people at risk of, or living with, a chronic condition, including HIV/AIDS.

As a result of this focus, we’ve also made difficult decisions to transition or sunset some business lines. However, thanks to partners like FIRST 5 Santa Clara County and Catholic Charities of Santa Clara County, we’re pleased that some of these business lines - including Family Resource Centers - will continue to operate and benefit the community.

Thank you for your continued support as we strive to build health equity in greater Silicon Valley. Together, we can ensure that everyone in our community has a fair opportunity to be as healthy as possible.

Sincerely,

Michele Lew
Chief Executive Officer

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**Board of Trustees**

**AS OF FEBRUARY 2019**

- Michael Celio, J.D.
  - BOARD CHAIR
- Roberta L. Robins, J.D.
  - BOARD VICE CHAIR
- Emily Lam, M.P.P.
  - BOARD SECRETARY
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- Greg Henderson
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- David Neighbors, C.P.A., M.S.T.
- Rita Nguyen, M.D.
- Joann Zimmerman, R.N.
As a **FUNDER**

Our endowment provides us the unique opportunity to provide a direct benefit to residents of Santa Clara and Northern San Benito counties by awarding Health Partnership and Community Grants to nonprofit organizations and public agencies. These restricted dollars are invested in the community to support projects that advance health equity.

Health Partnership Grants are awarded for medically-related purposes and are made in conjunction with our Hospital Sponsor, the Santa Clara Valley Medical Center. During Fiscal Year 2018, The Health Trust awarded 13 Health Partnership grants totaling $1,303,700.

In addition to the grants listed, The Health Trust awarded 38 Community Grants totaling $59,995 for one-time events or projects.

### Health Partnership Grants

- **City of San Jose – Department of Parks, Recreation and Neighborhood Services** – $10,000 over nine months to support the fourth annual VivaCalle San Jose event.
- **Community Seva** – $13,250 over 10 months to support start-up costs for its first commercial kitchen in San Jose and to support its inaugural Gala fundraiser.
- **Happy Hollow Foundation** – $10,000 over eight months to support the 2018 Senior Safari Walkabout Series.
- **JSI Research & Training Institute, Inc.** – $37,752 over four months to conduct an assessment to provide a community-level understanding of Ryan White clients’ unmet case management needs.
- **Loaves & Fishes Family Kitchen** – $35,000 over 12 months to pilot a congregate meal site, targeting low-income older adults who are food insecure, and to assess whether they can become a Senior Nutrition Program (SNP) delivery provider to other SNP sites through a cost-effective, sustainable meal model that meets the County of Santa Clara’s nutritional standards.
- **Office of the Mayor through the San Jose Parks Foundation** – $100,000 over 12 months to increase the number of older adults engaged and retained in volunteerism throughout the city of San Jose with an intergenerational model.

Continued on page 5
51 grants awarded through Health Partnership and Community Grants

$1.3M+ invested in our community as a Funder
Public Health Institute – $555,998 over 12 months to support the Public Health Professional Development Program.

Second Harvest Food Bank of Santa Clara & San Mateo Counties – $202,000 over 24 months to decrease food insecurity at affordable, supportive housing complexes and mobile home parks.

Silicon Valley Council of Nonprofits – $69,200 over 12 months to ensure that county-wide public policies support older adult needs in the areas of food security, access to care, and housing.

Silicon Valley Leadership Group Foundation – $90,000 over 24 months to promote and support physical activity during school hours, and in after-school and summer program sites, targeting underserved communities in Santa Clara County.

SPUR – $30,000 over 12 months to support Phase II of the Double Up Food Bucks (DUFB) Program in Santa Clara County.

Working Partnerships USA – $75,500 over 12 months to create affordable housing opportunities with supportive services targeting people who require Long Term Services & Support (LTSS), and to address system flaws and policy gaps that impede the provision of additional housing options and related services.

Youth Alliance – $75,000 over 12 months to support the expansion of community-wide behavioral health services for a critically underserved youth population in Northern San Benito County.

Community Grants

African American Community Services Agency
Aging Services Collaborative of Santa Clara County through Silicon Valley Council of Nonprofits
Alum Rock Counseling Center
Asian Americans for Community Involvement of Santa Clara County
Assembly District 27 through Veggielution
Bay Area Women’s Sports Initiative
Chavez Family Foundation
City of Morgan Hill
City of San Jose, District 9
Community Health Partnership
Congregation Shir Hadash
County of Santa Clara, District 3
Cristo Rey San Jose High School
Downtown Streets Team
Ethiopian Community Services, Inc.
Foothill Health Center, Inc.
Gay Pride Celebration Committee of San Jose
Gilroy Compassion Center
Healthier Kids Foundation Santa Clara County
Ivy Rose Community Foundation
Kids in Common through Planned Parenthood
Latina Coalition of Silicon Valley
Loaves & Fishes Family Kitchen
Lucile Packard Children’s Hospital Stanford
On Lok, Inc.
Parents Helping Parents
People Acting in Community Together
Portuguese Organization for Social Services and Opportunities
RotaCare Bay Area Clinic
San Jose Parks Foundation
San Jose State University, College of Applied Sciences and Arts
SJB Child Development Centers
SOMOS Mayfair
South County Collaborative
SV@Home
Uplift Family Services
VMC Foundation
Working Partnerships USA
As a PROVIDER

Fiscal Year 2018 Programs & Services

Chronic Disease Management Services
Chronic Disease Self-Management Programs
  Better Choices, Better Health
  Chronic Pain Self-Management
  Diabetes Self-Management

Falls Prevention Programs
  A Matter of Balance
  EnhanceFitness
  Tai Ji Quan: Moving for Better Balance®

HIV/AIDS Services
  Case Management (Medical, Non-medical, and RN)
  Housing for Health
  Project START Plus

Food & Nutrition Services
  Food Access Pilot Project
  Food is Medicine
  Food in Housing
  Friends from Meals on Wheels
  Meals on Wheels
  Produce Mobile at Tropicana
  The Health Trust Jerry Larson FOODBasket

Housing Services
  Permanent Supportive Housing
  Rapid Rehousing
  Family Support Services

To learn more, visit healthtrust.org

We meet health needs in our community that might otherwise go unmet by delivering an array of quality and culturally competent services in the areas of Food & Nutrition, Chronic Disease Management, and Housing. In Fiscal Year 2018, we invested $15,969,517 in the community through our programs and direct services. We also expanded our services in the areas of Food & Nutrition and Chronic Disease Management.

New Food & Nutrition Services

Food is Medicine
The Health Trust, as a member of the California Food is Medicine Coalition (Cal FIMC), is participating in the Medi-Cal Medically Tailored Meals Pilot Program, a three-year, $6 million State funded pilot program that launched in April 2018. The goal of the program is to reduce 30-day and 90-day hospital readmissions for participating clients, reduce healthcare costs, and improve health outcomes.

*The Health Trust’s involvement in the pilot program is also supported by Kaiser Permanente Northern California Community Benefit Programs.

Meals on Wheels - Mini-Expansion and Study
In Fiscal Year 2018, The Health Trust received funding from El Camino Healthcare District to provide meals to 100 new clients in Sunnyvale and Mountain View. The funding also required the tracking of emergency room and hospitalization self-reported visits for these new clients. At year’s end, the report for the period of July 1, 2017–June 30, 2018 showed a 68% reduction in emergency room visits, and a 73% reduction in hospitalizations for these clients.

Continued on page 8
$15.9M+
invested in our community as a Provider

450,031 pounds of produce distributed

130,000+ nutritious meals delivered to meet the health needs of our clients
New Chronic Disease Management Services

Chronic Pain Self-Management Program
In Fiscal Year 2018, we expanded our suite of Chronic Disease Self-Management Programs when we began offering a Chronic Pain Self-Management Program. A fun and interactive program, Chronic Pain Self-Management is offered for six weeks by two trained leaders from the community. Workshops are for anyone dealing with the challenges of living with chronic pain.

EnhanceFitness
Our suite of Falls Prevention Programs expanded in Fiscal Year 2018 to include EnhanceFitness. Offered in partnership with the Silicon Valley Healthy Aging Partnership, EnhanceFitness is a structured group exercise program designed to help older adults learn about strengthening, flexibility, and low impact aerobics. The goal of the program is to improve the health status of participants and reduce their use of health care.

Tai Ji Quan: Moving for Better Balance®
In partnership with the Silicon Valley Healthy Aging Partnership, we began offering Tai Ji Quan: Moving for Better Balance® in Fiscal Year 2018 as one of our Falls Prevention Programs. Tai Ji Quan: Moving for Better Balance® is meant to prevent falls in older adults and individuals with balance disorders by improving the strength, balance, mobility, and daily functioning of participants.
participants in our Chronic Disease Self-Management Programs

clients supported by HIV/AIDS Services

Falls Prevention Program sessions offered
As an ADVOCATE

We identify a health disparity in our community, find a proven solution, build a coalition of strategic partners, and get to work. When successful, our target population benefits, as does the community at large. No advocacy effort of ours exemplifies this better than our effort to fluoridate San Jose’s drinking water.

Fluoridating San Jose to Improve Oral Health for Low-Income Children in Silicon Valley

In 2001, we commissioned the *Oral Health Status of Children in Santa Clara County* report. We found that children from low-income families experienced more than twice the rate of untreated decay as their peers and were five times more likely to have been unable to get needed dental care.

These alarming findings were the catalyst for a series of oral health advocacy efforts that led to Santa Clara Valley Water District adding fluoride at its Santa Teresa Water Treatment Plant in 2017. As a result, people in east San Jose, Almaden Valley, and Santa Teresa are now receiving fluoridated water.

Why Fluoride

Dental Caries (Cavities) #1 Chronic Childhood Illness

- 5 times more common than asthma
- 20 times more common than diabetes

San Jose is the largest city in the country without fluoridated water

Fluoride reduces tooth decay 18%-40%

Fluoride Advocacy Timeline

2006

Created a feasibility report and road map for fluoridating Santa Clara County’s complex water system

2007-10

Built a coalition of experts and strategic partners, and mobilized the community

2011

Santa Clara Valley Water District board unanimously voted to support fluoridation at the district’s three water treatment plants

2012

Santa Clara Valley Water District entered into a public/private partnership to fund fluoridation

2016-17

Santa Clara Valley Water District added fluoride at its Santa Teresa Water Treatment Plant

2017

People in east San Jose, Almaden Valley, and Santa Teresa began receiving fluoridated water

2018

Santa Clara County Public Health Department receives funding to lead oral health needs assessment and planning and ensure water fluoridation for more county residents
Financial Overview

CONSOLIDATED STATEMENTS

Financial Position

FISCAL YEAR ENDED JUNE 30, 2018

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$2,268,692</td>
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<tr>
<td>Investments</td>
<td>$97,333,077</td>
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<tr>
<td>Receivables and prepaids</td>
<td>$5,439,994</td>
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<tr>
<td>Property and equipment (net)</td>
<td>$4,547,390</td>
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<tr>
<td>Other assets</td>
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<td><strong>TOTAL ASSETS</strong></td>
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<tr>
<th>LIABILITIES</th>
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<td>Accounts/Grants payable</td>
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<tr>
<td>Other accrued expenses</td>
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<td><strong>TOTAL LIABILITIES</strong></td>
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<table>
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<tr>
<th>NET ASSETS</th>
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<td>Unrestricted</td>
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<td>Temporarily restricted</td>
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<tr>
<td>Permanently restricted</td>
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<td><strong>TOTAL NET ASSETS</strong></td>
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Activities

JULY 1, 2017 – JUNE 30, 2018

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<th>REVENUE</th>
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<td>Public support</td>
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<tr>
<td>Net investment &amp; other revenues</td>
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<tr>
<td>FASS*</td>
<td>$2,674,974</td>
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<td>Fee for service &amp; other fees</td>
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<td><strong>TOTAL REVENUE</strong></td>
<td><strong>$25,832,306</strong></td>
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<th>EXPENSES</th>
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<td>Program Services</td>
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<tr>
<td>Grants**</td>
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<td>FASS*</td>
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<td>Management &amp; General</td>
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<tr>
<td>Fundraising</td>
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<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>$23,165,400</strong></td>
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<tr>
<th>OTHER NON-OPERATING ACTIVITY***</th>
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<tbody>
<tr>
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<td>$2,618,556</td>
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*wholly owned subsidiary of The Health Trust

**Includes grants made by The Health Trust and Destination: Home, a former program of The Health Trust

***discontinued dental clinics and spun-off Destination: Home
Thank You to Our Supporters

Building health equity is only made possible by the generosity of our funders, donors, and volunteers. As a 501(c)3 nonprofit, these partners play a vital role by supporting our work. Because our assets are used to support administrative costs, 100% of all donations are used to directly support our services. Thank you to all of our Fiscal Year 2018 funders, donors, and volunteers.

CORPORATE VOLUNTEERS
play an integral role in helping deliver vital services. For volunteer opportunities, contact volunteers@healthtrust.org

Wellness Visionaries
$500,000 & up
California Department of Public Health, Office of AIDS
City of San Jose Department of Housing
County of Santa Clara Office of Supportive Housing
County of Santa Clara Public Health Department
First 5 Santa Clara County

Wellness Champions
$100,000 to $499,999
Applied Materials Silicon Valley Turkey Trot - Silicon Valley Leadership Group Foundation
California Department of Health Care Services Corporation for National and Community Service - AmeriCorps VISTA
County of Santa Clara Social Services Agency
The David and Lucile Packard Foundation
El Camino Healthcare District
Housing Authority of Santa Clara County
Santa Clara Family Health Plan
Sourcewise
U.S. Department of Agriculture - Agricultural Marketing Services

Directors’ Circle
$25,000 - $99,999
1440 Fund (an advised fund of Silicon Valley Community Foundation)
Anonymous
Bella Vista Foundation
City of Mountain View
Consulate General of Mexico in San Jose
Hurlbut-Johnson Charitable Trusts (an advised fund of Silicon Valley Community Foundation)
LinkedIn Corporation
Mercury News Wish Book Fund
Symantec
**Benefactors’ Circle**  
$10,000 - $24,999

- Alliance Credit Union  
- Applied Materials Foundation  
- Broken Oak Trust  
- Michael Celio, J.D.  
- City of Campbell  
- City of Sunnyvale  
- Gilead Sciences  
- MAC AIDS Fund  
- Meals on Wheels America  
- SCAN Health Plan  
- Star One Credit Union  
- Sutter Health Palo Alto Medical Foundation

**Investors’ Circle**  
$2,500 - $9,999

- Anonymous  
- AvalonBay Communities, Inc.  
- Bryce and Darla Beck  
- Roy U. Billings  
- The Boucher Family Foundation  
- Broadway Cares/Equity Fights AIDS  
- Michele Brown  
- The Burt and Barbara Foundation  
- City of Milpitas  
- Barbara and Martin L. Fishman, M.D.  
- Douglas and Janet Ginter  
- Diane Hawkes  
- Janet Heldt and Crystal West  
- Helms Foundation  
- Heritage Bank of Commerce  
- Hugh Stuart Center Charitable Trust  
- J.W. & H.M. Goodman Family Foundation  
- Marianne Jackson  
- Jockers Family Foundation  
- Greg M. Krodel  
- Emily Lam, MPP  
- Michele Lew  
- Lucy Lofrumento  
- Macy’s  
- Michael and Ina Korek Foundation Trust

**Leadership Circle**  
$1,000 - $2,499

- Thelmer and Patricia Aalgaard  
- Robert and Denise Aitken  
- Azzani Search Consultants  
- Fred J. Bedard  
- The California Endowment  
- The Carter Family Charitable Foundation Inc.  
- Dorothy Chen  
- City of San Jose, District 9  
- CliftonLarsonAllen  
- Lynda Colletta  
- Reese and Kathleen Cutler  
- Gordon and Carolyn Davidson  
- Susan Devencenzi  
- Donald & Elizabeth Allen Family Fund  
- Kathleen Drayson  
- Andrea J. Elliott  
- Fox Family Charitable Gift Foundation  
- Philip and Junko Freidin  
- Jan Gabus, D.D.S.  
- Gilroy Foundation  
- Girl Scouts of Northern California Troop #61030  
- Google, Inc.  
- Dora Gutierrez  
- Thomas and Roberta Henderson  
- James and Diane Hutchison  
- Knight Foundation Fund

**Gift-in-Kind Donors**  
Valued at $1,000 & up

- Rock Bottom Restaurant & Brewery  
- San Jose Earthquakes Community Fund  
- Second Harvest Food Bank of Santa Clara & San Mateo Counties  
- Sobrato Family Foundation  
- Studio Dizon

Every attempt has been made to assure the accuracy of these lists. Please email donations@healthtrust.org to address any errors or omissions. Thank you for your support.