



ABOUT HEART OF THE VALLEY

Committed to facilitating, advocating, and supporting independent living for seniors residing in West Santa Clara County.

Heart of the Valley, SERVICES FOR SENIORS (HOV) was founded in 1987 by five compassionate Santa Clara County residents who knew that everyone wins when seniors can remain longer in their own homes. Seniors' lives are richer and more fulfilling when they can continue to live independently and remain engaged in the life of their communities.

For the past 30 years, HOV and its volunteer brigade have helped thousands of seniors to live independently in their own homes. We do this by offering a range of services and programs, from escorted transportation to yard work, to paperwork help, to home safety checks, and much more. And we do it all at no charge to our clients.

Our service area is western Santa Clara County—Sunnyvale, Cupertino, Santa Clara, Saratoga, Monte Sereno, Los Gatos, Campbell and six zip codes in western San Jose (95117, 95125, 95126, 95128, 95129 & 95130). Seniors (65 and over) simply phone our office a week in advance of the service they need. We then contact one of our helpful volunteers who schedules the service visit with the client. No paperwork, application or registration fee or other process is required; an envelope requesting an optional donation is mailed afterward.

A message from the...



Executive Director

Heart of the Valley got its start in 1987. That was when the average age of a widow was 59 years old, so we helped seniors 59 and older. Clients all had land lines and the more modern homes had moved to push button phones, but most didn't have answering machines. Long distance calls were expensive, which contributed to isolation from family members. Some people were beginning to use pagers, but hardly any seniors had them.

About half of our clients received some form of pension to supplement their social security, which pretty much covered their living expenses. Thirty years ago, many seniors retired with health care benefits. Seniors went to fewer medical appointments and hospital stays were longer. Smoking was an issue, so we had volunteers to take the smokers and volunteers who requested non-smoking clients.

There was no 24-hour TV, so we received more calls for friendly visitors, especially on weekends because there were no soap operas or game shows to watch and seniors could feel quite lonely. There were no microwave ovens, so seniors would request volunteer help with meal preparations. Seniors requested trips to the library and help reading newspapers, books and writing letters and business correspondence. Since most seniors belonged to a church, HOV supplemented the services the church members provided.

Back then we could see seniors off at the airport. I remember even escorting a frail lady onto the plane and getting her seated and ready for the flight!

Thirty years later, Heart of the Valley continues to receive requests from seniors, only now they must be 65 or older and the population is growing as the baby boomers get on board. While services like yard work and handyman requests have remained about the same, we get more calls for transportation to medical visits, business appointments, and more shopping and errands. Many seniors struggle financially to make ends meet as pensions have disappeared and they only have their social

security check to rely on. About 65% of the clients we serve live at or below the poverty level for our service area. While many services have evolved, the needs of seniors for volunteer assistance continues to grow.

In addition to the many services HOV volunteers provide, they are trusted friends. For a frail elderly or disabled person who has sustained many losses, trust is especially important. HOV volunteers go far in helping seniors feel empowered and independent in their lives, which is so meaningful and important to HOV clients.

During my 27 years as Executive Director, I am amazed by the connections that are made daily through Heart of the Valley: the donated items that directly benefit seniors in need, the friendships developed between clients and volunteers, the Board Members who find creative ways to share our story and inspire donors to give to benefit the older people we serve and the staff and office volunteers who teach each other so that we can enhance the services we are eager to provide. My deep appreciation to each one of you. I hope you all wake up every morning knowing you have improved the life of a senior.

Glenda Cresap
Executive Director

A message from the...



Board President

Our theme this year is “30 Years of Compassion in Action”, which amply describes your continued commitment through the generosity of your time and resources over the years for the seniors of Heart of the Valley! Compassion is defined as sympathetic concern, empathy, fellow feeling, care, sensitivity, warmth, love, tenderness, kindness, humanity and charity for the needs and well-being of our fellow human beings. Whether you are a volunteer or a supporter of our seniors, you show these qualities to our seniors who need a helping hand to remain living independently in their homes.

Heart of the Valley has had a busy year thanks to you - our volunteers, funders and supporters! Daily, clients call to sing your praises. They

constantly tell the office staff and volunteers how grateful they are for Heart of the Valley. They tell us of your kindnesses and helpfulness, that they don't know what they would do without you, and, how important you are in their lives. So, a great big THANK YOU from the Board of Directors and everyone at Heart of the Valley for all that you do and all that you give.

In the years I have been a volunteer, Board Member and donor of Heart of the Valley, I have seen the qualities of compassion in all of you as well as with the staff. You have been caring and sharing of your time, talent and treasure. As President, I am proud to say that we have been able to continue serving our seniors due to you - our volunteers, funders and supporters of all kinds who are the Compassion and Heart at Heart of the Valley!

Our heartfelt thank you to each of you!

Deanna Barnett
President of the Board

A message from the...



Volunteer Coordinator

My congratulations to everyone who has chosen to volunteer! Whether you choose to volunteer with Heart of the Valley or elsewhere, this simple act of reaching out to help others is an incredible service and a great value to all of us!

Heart of the Valley, SERVICES FOR SENIORS, Inc. is a volunteer agency. At Heart of the Valley, everyone volunteers!

Along with 3 part-time, 20 hour a week staff, we coordinate, manage and facilitate transportation, in-house services, special programs (Household Hazardous Waste, 5D Pharmaceutical Disposal, Safe At Home and others). In addition to our field volunteers, we also have numerous virtual opportunities, office administrative positions and program assistant positions available.

These services are our commitment to the independent seniors in our service area, 65 years of age and above, who want to stay in their own homes.

We have approximately 250 volunteers, some long term and many who come and go as they may have families, jobs, school and other commitments. Some just move out of our area. And some of our volunteers, who move or are otherwise committed, find a way to stay on with us because they are so invested in what we do for the seniors in our community! We have volunteers in Sydney Australia, and Alaska along with Texas, Massachusetts, Florida, Illinois and throughout California in cities like Fresno, Redwood City, San Diego, Long Beach, San Francisco and others. Our volunteers are diverse in age, education, culture and where they live!

Because these volunteers are truly the heart and engine of our agency, we strive to give them a home; to create a place they feel comfortable and appreciated for all that they give us. We hear every day how much our clients truly value our volunteers and the services they provide. We hear how beloved they are, how life changing, not only to the senior, but to their families who live out of town, state or country. At Heart of the Valley, our volunteers are able to give peace of mind reaching far beyond the services they provide.

We optimize our resources to make the process of volunteer services as easy and rewarding as possible. One way we will achieve this is with our new Volunteer Management System (January 2017) which allows our volunteers to select the services that work best with their schedules and passions. This can be done via our online Volunteer Portal any time and from anywhere!

With pending Heart of the Valley programs such as Seniors in Technology, LYFT with a Heart, and the ongoing Night Riders and Vets Driving Vets, we keep a volunteer base that is engaged, enthusiastic and rewarded.

Kirby Cristobal
Volunteer Coordinator



A message from the...



Administrative Manager

This past year has been an exciting and busy one at the Heart of the Valley office. We couldn't have gotten it all done without the help of our team of office volunteers. They answer phones, do photocopying, data entry on spreadsheets, and much more.

We were lucky to be able to train five new office volunteers this year. There were a couple of technical hiccups with our email and website but with the help of several wonderful 'techies' we were able to get back to business.

Our biggest change has been the recent launch of our new electronic 'jobs board' (aka the Volunteer Portal). Our volunteer drivers, gardeners, shoppers etc. can now view all pending client requests on a web-based calendar and sign themselves up to help. They don't need to wait for us to call or email. In preparation for the launch we trained staff and volunteers, wrote instructional manuals and moved our volunteer and client information into the new computer program.

Coming up in 2017 we will be recruiting and training more office volunteers and assessing and adapting our 'jobs board'. In the spring, it will be time to do some sprucing up around the office. And like every year, we will be evaluating and amending our office forms and procedures so we can better serve our volunteers and clients. Looking forward to working with you in 2017!

Eleanor Seath

Administrative Manager

Heart of the Valley
Board of Directors and Staff



BOARD OF DIRECTORS

President: Deanna Barnett
Vice President: Dennis Moore
Secretary: Suzanne Dugan
Treasurer: Derek Jensen
Director: Melissa R. McKenzie
Director: Meghan Hibner
Director: Sanjai Marimadaiah
Director: Mariel Bolhouse

STAFF

Executive Director:
Glenda Cresap
Volunteer Coordinator:
Kirby M. Cristobal
Administrative Manager:
Eleanor Seath

We love to help!

2016 Service Statistics

♥ **3,449** initial service calls from **423** clients

♥ **229** volunteers donated **27,000** hours

♥ **39,000** miles driven

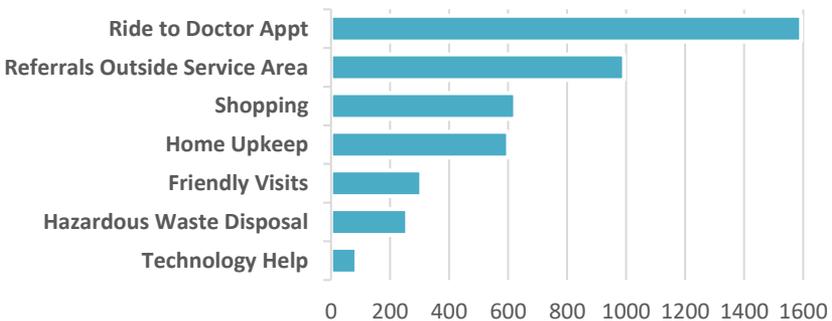
Client Demographics

- ♥ 84% were women
- ♥ 79% live alone
- ♥ 67% were over 76
- ♥ 66% live at or below the poverty level
- ♥ 34% were disabled
- ♥ 29% have no family
- ♥ 94% call for help themselves

Services by City

- ♥ Santa Clara 52%
- ♥ San Jose 19%
- ♥ Sunnyvale 11%
- ♥ Cupertino 9%
- ♥ Campbell 6%
- ♥ Saratoga 2%
- ♥ Los Gatos 1%

Services by Type



Just a call away...

Special Services

Disaster Preparedness Project: Trained volunteers conduct safety checks, develop disaster plans and create disaster kits for seniors.

“Safe at Home”: Volunteers visit seniors’ homes and perform safety checks including locks, lighting, tripping hazards, etc. We also change batteries in clocks, watches and remotes. This program includes the “Have a Heart” neighbor check-in program.

Assistive Devices: The community donates wheelchairs, walkers, shower chairs, canes, etc. to pass along to seniors in need.

In-A-Pinch (IAP): Volunteers provide same day (24-48 hr.) services for client’s immediate needs. This program doesn’t replace existing 7-day notice service, but is there when more immediate needs occur. (e.g. sick pet, unforeseen medical appointment or shopping, etc.)

Humane Hearts 4 Pets & Seniors: HOV collaborates with the Humane Society of Silicon Valley to meet the needs of our clients with pets. HOV volunteers also take clients to pick up supplies and food from the Humane Society’s Pet Pantry.

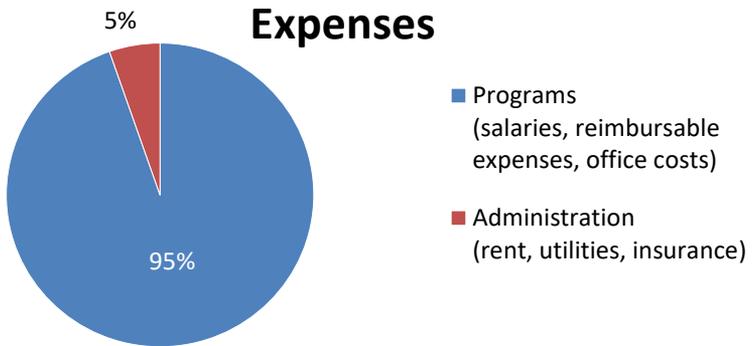
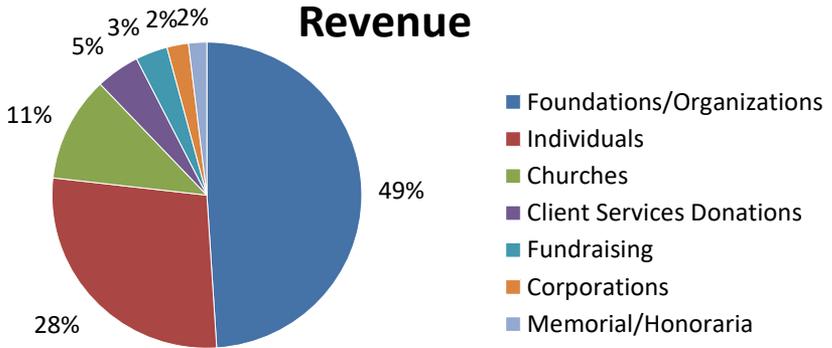
Seniors in Tech: HOV volunteers will teach seniors how to shop online, use email, research medications, make doctor’s appointments and much more from the comfort of their own homes.

Young At Heart: Senior isolation can lead to poor physical and mental health. This program will encourage seniors to leave their homes by utilizing our volunteers to go track walking, visit local parks, go to museums, events, plays or theatre.

New in 2017! Lyft from the Heart: a concierge service for seniors who want to schedule rides with Lyft but do not have smart phones. Upon request, HOV will schedule rides or send a volunteer to help a client learn how to use their smart phones to reach Lyft and take their first ride with them if they prefer.



Financial Summary 2016



Total 2015 Revenue	\$115,458
Total 2015 Expense	<u>\$99,370</u>
Revenue in excess of Expense	<u><u>\$16,097</u></u>
Net Assets 12/31/15	\$73,636
Net Assets 12/31/16	\$89,776
In kind giving	\$7,709

You fuel HOV...

Ways to Give

Heart of the Valley relies upon your tax-deductible contributions to continue helping the seniors we serve to remain independent in their own homes. Here are many ways you can contribute to this important cause (visit our website for even more options):

- ♥ **Volunteer** with clients, work in our office, or serve on our board
- ♥ **Donate** cash or items to help support our office or our clients
- ♥ **Pledge** a donation in monthly or quarterly installments
- ♥ **Memorialize or honor** a loved one by donating in their name
- ♥ **Donate stocks** to avoid capital gains tax – it's also tax deductible
- ♥ **Give a vehicle or real estate:** We sell it; you get the deduction
- ♥ **Endow:** We invest the principle and only withdraw interest and dividend income to support seniors in perpetuity
- ♥ **Become a sponsoring business:** We will gladly promote your giving
- ♥ **More ways to give:**   

TAX-DEDUCTIBLE GIFTS: We accept cash, checks and credit cards. Visit our website at www.servicesforseniors.org and click on the “Donate” button to submit your donation via Paypal. Annual or onetime gifts may also be made by mailing a check to Heart of the Valley, PO Box 418, Santa Clara, CA 95052. In kind gifts of securities, services, personal property, including vehicles or real estate, may be made by contacting the Heart of the Valley office for instructions.

We are a non-profit 501(C)(3) organization. Federal ID: 77-0154535 State ID: 1195602.

In their own words...

From a Client



Discovering Heart of the Valley was golden for me. I had just lost my husband in a tragic accident a few months earlier when I was told I needed major surgery. After the operation, still in a weakened condition, I was unable to drive, had no close relatives I could call on nearby, and did not want to impose on my friends. It was then someone told me about Heart of the Valley.

From my first contact with the volunteer who took my phone call, through the years that I have used its services, not only to provide transportation to medical appointments, but also to meetings, even memorials for good friends, Heart of the Valley has been a lifeline. I shall not forget dedicated volunteers like Helen, now herself confined to a nursing home, and Tony, a Pearl Harbor survivor who helped ease my anxiousness over medical appointments, sharing stories with a spark of humor on the way.

Now in my eighties with doctors' visits more frequent, I feel a sense of security knowing that I can turn to Heart of the Valley. It is unique, its volunteers exceptional, taking you to and from your appointments, staying with you until your visit is over. I am truly grateful that seniors, like myself, have this wonderful organization to help us with vital transportation needs, allowing us to continue to live independently.

Shirley Odou, Age: 86

In their own words...

From a Volunteer

I have had a few good experiences while doing Household hazardous waste pickups. I know there are more than come to mind right now. But then there is always more than I remember.

I believe on 2 occasions my wife and I picked up some garden chemicals and in the box were a couple of sofa cushions. I told the lady that I did not believe they were hazardous material. She just wanted to get rid of them, so I threw them in the truck. I cut them apart at home and threw them in the garbage. Pillows gone---client happy.

I picked up 6 or 8 florescent tubes one day and the lady told me how she was going to have to find someone who could replace the tubes in her garage fixtures. I asked if she had a ladder and in 15 min we had a bright garage again.

One month I went to Sunnyvale to drop off my collection of paint and garden chemicals. I had a very productive set of clients that weekend. The truck was FULL. When the HazMat crew opened the back of my truck they were quiet for a few seconds and someone said "we need to get a picture of this".

Many times I have taken cardboard and paper for clients. I just toss it in my blue recycle bin at home and it is taken care of. I am sure there are more that I can't think of now. I am just helping out some folks and do not see it as a big deal, so I don't remember them. I left out anything about drug collections---shhhh.

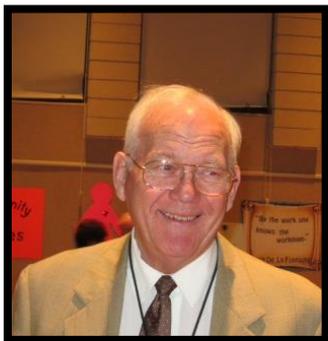
Ed Richards



In memoriam...

♥ Ted Chamberlain ♥

When it came to Heart of the Valley, Ted was all in!



During his 29 years at HOV Ted was not only one of our five founding members, but he also served on our board for 27 of those years holding the positions of President, Secretary and Treasurer. He volunteered in the office once a week writing financial reports and answering phones.

Ted was also a generous donor and a thoughtful, caring field volunteer. Ladies used to call and request the volunteer who looked like a movie star and we always knew it was Ted. In 1986, Ted joined four other Board members from the Santa Clara Methodist Retirement Foundation to form a volunteer agency with a mission to keep seniors living independently in their homes. Ted wrote, "It was decided to not care about how much money people did or didn't have but just get out there and work through qualified volunteers to help senior clients. We trusted that the community would step up to provide funding to support the efforts of volunteers.

After all these years, Heart of the Valley remains dedicated to helping seniors stay active and in charge of their lives and in their own homes."

Ted loved people and he had an eye for seeing what was special or interesting in each person he met. He was quick to return a phone call or Email, and attended hundreds of meetings and almost all of our events and celebrations over the years. Ted was always concerned for our solvency and spent a great deal of his time fundraising to honor his commitment "to make sure we could keep our doors open". He was never too busy for Heart of the Valley. We are fortunate to have many warm memories and enormous gratitude for everything Ted has done on behalf of the seniors, volunteers and our community. He had a favorite quote, "Be a lamp, a lifeboat or a ladder." Ted was all three. Ted passed away on July 3, 2016.



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