

Executive Director's Message

At Heart of the Valley we believe that personalized services are better services. Our volunteers act as friendly neighbors to empower our clients to remain independently living in their homes and communities that hold a lifetime of memories. A 90 year old client told me this year, "I use Heart of the Valley volunteers but I know I can't just rely on their kindness. I still need to keep my ability to do things for myself." No one enjoys being dependent upon others. Freedom and independence are among the qualities that people value most. This does not change when we get older. Seniors don't want to leave their homes and often balk at accepting home care assistance. "Heart of the Valley volunteers act more like friends who drop by to lend a helping hand, not caregivers," Grace said she tells her daughter. This is an important distinction to the seniors who call our office looking for assistance.

This is also important to the many busy volunteers who support our program. They want to help, but they don't want someone to become dependent upon them. Volunteers have active lives, families, careers, school, and find value in the services they share with our clients. "My Mom told me she noticed that since I started helping out older people I've become a better person. That really surprised me, because I hadn't noticed", shared one of our student volunteers. Another volunteer told me that when she takes seniors to medical appointments, they always introduce her as their friend.

Thank you to all who sustain us in our mission to support seniors with their desire to maintain productive, meaningful and satisfying lives. For twenty-three years volunteers have given their time and talents to help seniors stay independent. We currently have 700 clients in our database and over 150 volunteers helping them in the West Santa Clara valley area. The most requested service we provide remains escorted transportation (80% for medical appointments) and the most requested in-home service is help with shopping and errands. One of our clients shared that the most important concern in his life before he found Heart of the Valley, was to how to get around. "Now my ride is just a phone call away, which makes both me and my son happy."

Glenda Cresap, Executive Director



Heart of the Valley, SERVICES FOR SENIORS, Inc. Financial Report 2009

Revenue:

Contributions–Organizations/Corp	36,943.97
Contributions– Individuals	9,770.13
Contributions–Churches/Others	3,195.00
Client Services	5,690.00
Vehicle Sales	12,507.79
City of Santa Clara–CDBG Grant	3,251.98
Fundraising	2,735.86
Memorial/Honorariums	1,395.00
Interest Earned	<u>124.01</u>
Total Revenue	\$75,613.74

Program Expenses:

Staff Expenses	36,317.95
Office, Telephone, supplies, maint.	8,089.54
Advertising, promotion, newsletter	1,232.57
Postage	2,306.18
Contract Program Manager HHW	2,552.00
Client Expense	1,414.20
Volunteer Expense	2,914.19
Annual Meeting Expenses	629.23

Administrative Expenses:

Rent & Utilities	2,783.35
Licenses Fees and Dues	250.78
Accounting/Tax fee	720.00
Insurance (net of refund)	1,064.51
Vehicle Program Expenses	<u>2,228.47</u>
Total Expenses	\$62,503.87

Net exp. in excess of revenue \$13,109.87

Equity 12/31/08 \$31,378.57
Equity 12/31/09 \$44,488.44

**In Kind Giving* \$29,000

SERVICES HOV PROVIDES:

Escorted Transportation: Volunteer drivers donate their own cars and gasoline. Volunteers drive seniors to medical and business appointments, to the movies or a restaurant, to do shopping and errands, to a club meeting, to get their hair fixed, out to the cemetery, or to visit a sick friend in the hospital and even take pets to the groomers and to the vet.

In-Home Services: Volunteers provide assistance with house projects, handyman services, yard work, computer assistance, paperwork, telephoning, visitation, respite, shopping and errands, advocacy, friendly phone calls, household hazardous waste pick up and referral.

Disaster Preparedness Project: Trained HOV volunteers conduct safety checks, develop disaster plans and create disaster kits and "to go bags" for seniors and their pets.

Assistive Device Program: The public donates various assistive devices such as wheelchairs, electric scooters, walkers, canes, crutches, and shower bars and we give them to clients who request them.

Senior Safety Net Program: Heart of the Valley working with the City of Santa Clara conducted a survey to identify needs of seniors 59+. Since the economic downturn, some of our clients haven't been able to afford the most basic of necessities. Clients in need contact our office or are identified by volunteers to receive much needed assistance. Funds for this purpose were donated by Orchard House, Inc., the Valley Foundation and many concerned individuals.

"Safe at Home": HOV volunteers visit seniors' homes and check for things like locks on doors, slippery floors, throw rugs and mats that need to be secured. We also check for appropriate lighting inside and out, for obstacles that need to be removed from high traffic areas, for railings and stairways in need of repair, we change batteries in radios, clocks, watches, remotes and check for overloaded circuits.

Heart of the Valley Newsletter: Published by Troop 906 on a quarterly basis to keep the community informed of Heart of the Valley activities, opportunities and needs.



Thoughts from our Board President, Deanna Barnett:

Helping Seniors Stay Independent is the mission of Heart of the Valley. We are able to accomplish this for over 700 people through the dedication and incredible spirit of giving and sharing of volunteers like you who share their time, talents and money. As we are all aware, the past year has been difficult economically. However, our volunteers have been willing to go the extra mile and give the time and energy needed to help others. Because of you we were able to accomplish a great deal on an extremely small budget. AND, we ended 2009 in the black!

One foundation that gave us money commented that they had never seen such dedicated, caring volunteers who served so many people. They were extremely impressed with all of you! The clients, office staff and board brag about you all the time. Thank you for all that you do.

Volunteers and clients have come up with suggestions to improve HOV. We have begun several new projects that have given us newspaper coverage and exposed HOV to politicians and members of the community. Among the new projects initiated this past year is picking up household hazardous waste as well as a second program for expired and over the counter medications/prescriptions. Both of these programs have been quite successful in the community.

The board itself has been thinking creatively about fundraising so HOV can continue to provide the many services offered. The year began with the successful silent auction and book corner at the annual meeting. This was so popular that many people have contributed to this year's auction. Mystery envelopes and tickets for baskets have been added. In these economic times, we are thinking as creatively as we can. Many clients gave additional donations to support the two new programs. The Mother's Day and Father's Day letters also brought additional

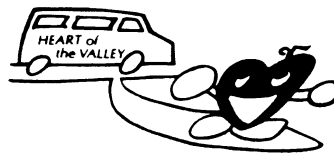
revenue. Thanks to you, there was a total of five new revenue sources.

It has been an, exciting, challenging, and gratifying year for all of us working together for HOV. I look forward to another wonderful year and getting to know even more of you. If you have thoughts or suggestions on more ways we can improve and/or for fundraising ideas, please contact me, any board member, or any member of the staff. We love hearing from you and appreciate your thoughts, suggestions and, most of all, your willingness to care and serve.



Our Mission Statement:

Heart of the Valley, SERVICES FOR SENIORS, Inc. is a 501(c)(3) corporation, committed to facilitating, advocating and supporting independent living for seniors residing in West Santa Clara Valley.

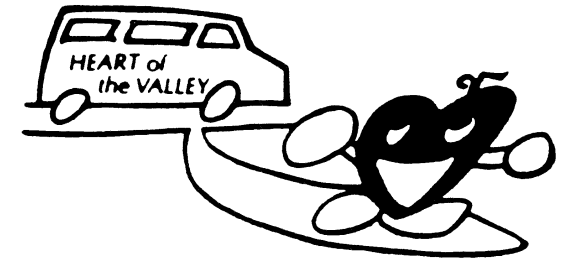


**Heart of the Valley,
SERVICES FOR SENIORS, Inc.**

Celebrating 23 years of care and commitment.

Heart of the Valley, SERVICES FOR SENIORS, Inc.

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**ANNUAL REPORT
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