

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 31 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 7 business days in advance of the service they need. We then place your request on our jobs board for our volunteers to see. The volunteer who is available for your request then calls you to schedule a time and date for your service. No paperwork, application, or registration fee or other process is required. A donation envelope is sent after your service allowing you the opportunity to donate.

Heart of the Valley, SERVICES FOR SENIORS, Inc.

P.O. Box 418
Santa Clara, CA 95050
Phone (408) 241-1571
Fax: (408) 241-1395

Email: contact@servicesforseniors.org

Web: www.servicesforseniors.org

Also follow us on:



Heart of the Valley SERVICES FOR SENIORS, Inc.

2017 Annual Report



Message from the Executive Director

I consider myself fortunate to work in a community that values working together to strengthen seniors so that they can continue to live in their own homes and manage their own affairs. Here at Heart of the Valley, our dedicated Board, staff, volunteers, and donors are passionate about providing what they can to promote self-sufficiency for those 65-100+!

By lending a helping hand we keep our clients mentally sharp, safe in their homes, improve their sense of well-being, and because we are here for them, many of the challenges of aging fall away. Each workday, we witness the power of volunteers to enhance the day to day lives of seniors, who in turn are so appreciative of their time and the important services provided. We are so proud of our dynamic team of volunteers and we know how fortunate Heart of the Valley is to have each one of them.

We credit our donors with keeping our doors open. Words cannot express our gratitude for each of them! In the spring of this year, we received a generous gift of

Our mission has remained the same for thirty-one years: To facilitate, advocate and support independent living for seniors residing in the West Santa Clara Valley.
—Glenda

\$25,000 from a beloved long time donor who passed away. In December, right before our office was to close for the holiday, Heart of the Valley received its largest one time donation to date from a thoughtful client who had sold her home. She gave Heart of the Valley a \$100,000 gift so that we could continue to provide needed services to seniors like the ones she has received from our caring volunteers! We are all so delighted and grateful for this large contribution, which provides our agency with financial security during these uncertain times.

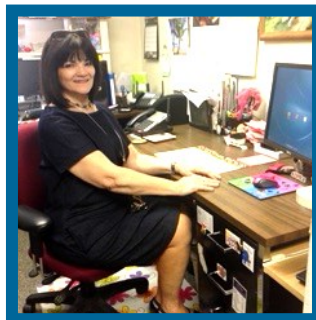
I encourage everyone to check out our new website at servicesforseniors.org. You'll find our website is designed to help you get the information you need quickly and easily to stay informed and engaged with HOV. We would like to update everyone's contact information so please call our office at (408)241-1571 or email us at contact@servicesforseniors.org if your information has changed.

I speak for all of us when I thank you: donors, volunteers, collaborators, clients and friends. Through your time, talents and treasure you have directly made Heart of the Valley a success again this year. I also want to thank those of you who have supported and encouraged me throughout all of my 28 years at Heart of the Valley.

— Glenda Cresap

Thank you so much for all the help you have given me and for all the wonderful work you do! You should be called "Heroes of the Valley"!

—Shirley, Client



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. There 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.
- ♥ **Leave a legacy** by including Heart of the Valley in your will or estate planning. You'll be providing services for future generations of seniors!
- ♥ **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.

Many heartfelt thank yous for all the wonderful services you give. Without your friendly volunteers, I would be in BIG trouble. —Miriam, Client

Know that I love you for caring. —Sam, Client



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.

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.

New in 2018! Critter Companions: Clients can request a friendly pet to visit them in their home. We have a menu of pets that include: cats, dogs, birds, turtles and more! Volunteers can sign up to include their pet as a Critter Companion by calling our office and speaking with Kirby (408) 241-1571.

I called everyone, no one would help. Then I reached your number and a voice of an angel answered and said Heart of the Valley would send someone over. Did I ever get lucky!
—Walter, Client

I thank you so much for thinking of us seniors. Looks like not many people do. I will be 87 soon and I need just the kind of help you give. —Irene, Client

2017

Statistics

477 Clients

2962 initial requests for service

- ♥ 77% are women
- ♥ 87% live alone
- ♥ 38% have no family
- ♥ 55% are over 80 years of age
- ♥ 59% live at or below poverty level
- ♥ 69% have a disability

253 Volunteers

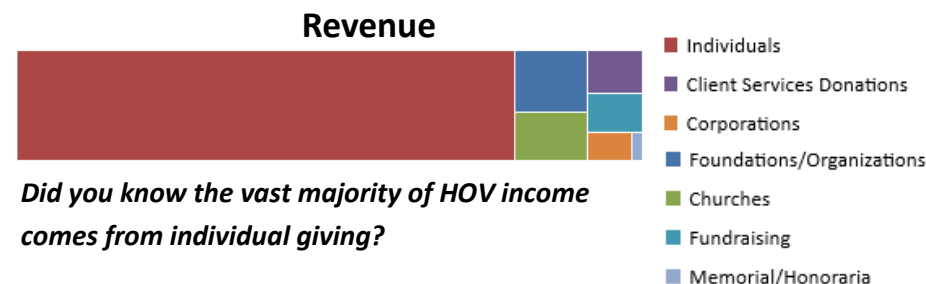
23,378 hours donated

- ♥ 36,930 miles driven
- ♥ 22 Bay Area cities represented
- ♥ 8 Bay Area cities served
- ♥ Ages range from 10-93
- ♥ 9 types of services offered
- ♥ 38 languages spoken

Finances

Total Revenue	\$204,620
Total Expense	\$104,841
Revenue in excess of Expense	\$99,779
Net Assets 12/31/16	\$89,776
Net Assets 12/31/17	\$189,618
In kind giving	\$26,300

94% spent on Programs
(salaries, client/volunteer expenses, office costs)
6% spent on Administration
(rent, utilities, insurance)



Meet the Office Staff

A small but mighty team of three part time staff coordinates volunteers, manages the office, and gets the funding necessary to provide seniors with the services they rely on. In August 2017 we said goodbye to our wonderful Administrative Manager for the past four years, Eleanor Seath. But don't dismay, Eleanor still volunteers with HOV!

Donna Young — Administrative Manager

Hello! I'm Donna Young, the new Administrative Manager. I've been the Tuesday HOV office volunteer for the past six years. I've also helped in the development of the new website that was rolled out in December 2017 and the Volunteer Portal which we have successfully utilized for a whole year! Some of our volunteers just love it, logging hundreds of service hours and driving our seniors thousands of miles. We also appreciate those volunteers who prefer to be contacted about a service via a friendly phone call or email. We will continue to strive to help our volunteers find the clients who need their help.

In 2018 we will continue to expand and improve our website to keep our community informed about happenings at HOV. We hope to provide a useful referral list for services not within our service area or mission. We will be working on standardizing our procedures and providing office volunteers training, so our clients better understand what services we can and cannot do, and how best to utilize our services to meet their needs. I look forward to working with all of you to make HOV the best it can be!

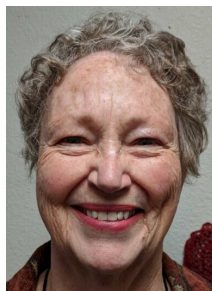


Kirby Cristobal — Volunteer Coordinator

Because our volunteers are truly the heart and engine of our agency, the office staff and I strive to give them a "home"; to create a place they feel comfortable and appreciated for all the good work they are doing and a true sense of fulfillment. The client is receiving an excellent service; the volunteer, through sharing their talents and passions, gets the satisfaction of reaching out with joy and happiness to someone else in need.

Heat of the Valley,
SERVICES FOR
SENIORS is above all a
volunteer agency.
-Kirby

Our volunteers not only provide services, they inspire new services such as Critter Companions: a visiting pet program in development. A volunteer couple has a trained dog who visits hospitals and they thought it would be terrific to bring this service to HOV clients. We are now working on this program, expanding our volunteer base to include dogs, cats, lizards, birds and even snakes!



Meet the Board of Directors



From left: **Derek Jensen**-Treasurer, **Mariel Bolhouse**-Director, **Dennis Moore**-President, **Deanna Barnett**-Vice President, **Daniel Lo**-Director, **Sanjai Marimadaiah**-Director.
Not pictured: **Suzanne Dougan**-Secretary, **Melissa McKenzie**-Director

Dennis Moore — Board President

We begin our 31st year of service with a strong, enthusiastic and talented board of directors and a stable financial footing. We are all looking forward to a productive 2018.

We have been the recipients of a number of large generous gifts this year. One of our clients donated \$100,000 from the sale of her home and another donor included \$25,000 to Heart of the Valley in her estate. With these and many other generous donations from donors and volunteers we will be able to continue to grow our program and continue providing valuable volunteer services to our seniors.

Our Board of Directors has been working on a 3-year Strategic Plan for Heart of the Valley. This plan will address:

- Development of HOV staff & Board members
- Technology office upgrades
- Future funding options

It is our goal to prepare for the future through diligent planning that will allow Heart of the Valley to continue its mission of allowing seniors to continue living independently in their homes in Santa Clara County for years to come!