

## Executive Director's Message

Twenty-five years is an important anniversary for any organization; it's a milestone of stability; a testament to perseverance.

Our twenty-fifth anniversary is about you. It's about the Santa Clara Methodist Retirement Foundation Board who came up with a mission to help seniors stay independent in their homes. It's about 5 members of that Board, Dave Sargent, Verna Freiberg, Aldyth Parle, Ted Chamberlain and Walt Fowler who developed a small volunteer agency that seniors could call on for a little extra help. It's about the hundreds of donors over the years, who trusted their money to be used to promote volunteerism in an effort to benefit seniors. It's about the approximately 600 diverse volunteers who stepped up to offer their time, treasure and talents to improve the lives of elderly clients. These volunteers worked in our office, on our Board, in our community, in the homes and lives of seniors and on the Internet, to keep Heart of the Valley operating with excellence and integrity. It's about the seniors who trusted Heart of the Valley to provide them with quality services with regard to escorted transportation and help in their homes.

In 2011, our 193 volunteers provided close to 11,000 hours of service for almost 500 seniors. Volunteers drove 33,721 miles on their own dime. Clients aged 59-60 received 1% of all services, clients aged 61-80 received 46% and clients aged 81+ received 46%.

I am often asked the secret of our longevity. We have such a small budget, we're a part-time agency, and have very few staff. One of my favorite quotes on volunteerism goes like this, "A pessimist sees a glass of water as being half empty, an optimist sees the same glass as being half full; but a giving person sees a glass of water and starts looking for someone who might be thirsty." Heart of the Valley's secret is that we have thrived for twenty five years because of these "giving persons." If your agency and programs are filled with "giving persons" there is simply nothing that you cannot accomplish!

Congratulations Heart of the Valley for a successful, productive and caring 25 years!

Glenda Cresap, *Executive Director*



# Heart of the Valley, SERVICES FOR SENIORS, Inc. Financial Report 2011

<b>Revenue:</b>	
Contributions-Organizations/Corp	\$13,557.50
Contributions- Individuals	\$12,666.27
Client Services	\$ 5,205.25
Vehicle Sales	\$12,450.00
City of Santa Clara-CDBG Grant	\$10,866.12
Memorial/Honorarium Gifts	\$ 3,010.00
"Fundraising, net of expenses	\$ 4,162.40
Contributions-Churches/Others	\$ 3,050.00
Interest Earned	\$ 31.78
Total Revenue	\$64,999.32

<b>Program Expenses:</b>	
Staff Expenses	\$55,265.24
"Office, telephone, supplies and Maint	\$ 8,115.06
"Advertising, Promotion, Newsletter	\$ 1,567.13
Postage	\$ 2,215.45
Contract Labor	\$ 5,075.00
Disaster Prep Expense	\$ 391.66
Client Expense	\$ 1,798.27
Volunteer Expense	\$ 3,667.72

<b>Administrative Expenses:</b>	
"Rent, Utilities & Insurance"	\$ 4,729.86
Licenses Fees and Dues	\$ 289.96
Annual Meeting Expenses	\$ 490.83
Accounting/Tax Fee	\$ 216.00
Bank Charges and Misc Expenses	\$ 242.38

<b>Total Expenses</b>	\$84,064.56
Expenses in excess of revenue	\$(19,065.24)
Net Assets 12/31/10	\$46,322.22
Net Assets 12/31/11	\$27,256.98
In kind giving	\$27,000.00

## Heart of the Valley Services

**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 and referrals.

**Disaster Preparedness Project:** Trained HOV volunteers conduct safety checks, develop disaster plans and create disaster kits for seniors. Funds supplied by City of Santa Clara, CDBG Program and Orchard House Foundation.

**Senior Safety Net Program:** 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 Foundation, 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. Includes a neighbor check in program "Have a Heart".

**Hazardous Waste Program:** Trained HOV volunteers at the request of clients, pick up old batteries, light bulbs, paints, insecticides, cleaners, electronics and toxic materials from their homes and take them to proper disposal sites.

**5D Program (Don't Dump Drugs Down Drains):** HOV volunteer accompanied by a police officer, at the request of clients, pick up used old or unwanted prescriptions and over the counter medications and take them to Police Dept. for proper disposal.



## Thoughts from our Board President, Deanna Barnett:

During the 10<sup>th</sup> anniversary remembrance of 9/11, I saw a story that immediately reminded me of you. The people were evacuation off Manhattan Island because of men with boats no matter the size. The evacuation was the largest sea evacuation ever in history. Larger than Dunkirk where 393,000 British and French troops had been evacuated in nine days. These men evacuated 500,000 in nine hours. Their comments were: "Average people stepped up." "Everyone helped everyone." "It was the morally right way to go." "Doing what we had to do." "Deep down everyone has hero in them." At the beginning of the video is a quote by Romain Rolland, "A hero is a man who does what he can."

In watching this twelve minute piece, I continually thought of you. You are heroes to the seniors you serve. You each step up and help others. Heart of the Valley exists because of your many contributions of time, talents and treasure. Your hearts of gold are an inspiration. In these economic times when many of us are struggling financially, many of the usual sources for grants and funding for Heart of the Valley have been struggling as well.

These are difficult times for many non-profits, even large, long standing ones. I was so sad to hear that after more than 120 years of serving the neediest in Chicago, Hull House closed its doors the end of January due to lack of funding. In 1889 Hull House was founded by Noble Peace Prize winner Jane Adams in Chicago.

In the last 25 years, there have been the usual ups and downs for Heart of the Valley. You have always been there to help and support in any way you can. We look forward to another 25 successful years helping seniors because of your hearts of gold.

If you would like to view the original broadcast of this story, you can watch it on "You Tube - Boatlift An Untold Tale of 9/11 Resilience."



### Our Mission Statement:

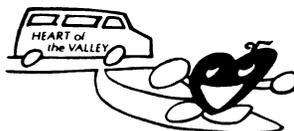
*Heart of the Valley, SERVICES FOR SENIORS, Inc. is a 501(c)(3) corporation, committed to facilitating, advocating and supporting independent living for seniors residing in West Santa Clara Valley.*



Sadly, on November 23, 2011 our dear Board Member, volunteer, donor and friend, Anita Marencia, passed away. She was famous for her "Elegant Teas." Agnes Repplier wrote, "*The tea hour is the hour of peace. Strife is lost in the hissing of the kettle~a tranquilizing sound, second only to the purring of a cat.*" I know Anita would agree. We are so grateful to have known her and she is deeply missed.



*"Transporting Seniors to Independence"*

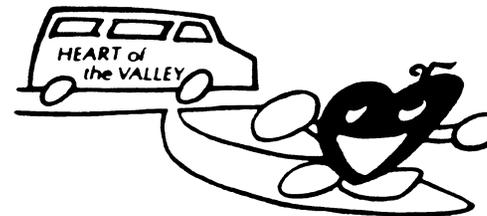


**Heart of the Valley,  
SERVICES FOR SENIORS, Inc.**

*Celebrating 25 years of care and commitment.*

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

P.O. Box 418, Santa Clara, CA  
(408) 241-1571 FAX(408)241-1395  
[seniorservices@aol.com](mailto:seniorservices@aol.com)  
<http://www.servicesforseniors.org>



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Carolyn Donnell, *Title V*

## ANNUAL REPORT 2011