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Department of the Treasury Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

► The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2008

Open to Public Inspection

A Fo	r the	2008 ca	elendar yea	r, or tax year beginning 07-	01-2008 and ending 06-30-20	09	D Franciscon idea	atification number	
B Che	eck if a	pplicable	Please	C Name of organization The Health Trust			D Employer ide	ntification number	
☐ Add	lress ch	nange	use IRS label or	Doing Business As			94-6050233 E Telephone nu		
☐ Nar	ne cha	inge	print or	Doing business as			E Telephone nu	mber	
┌ Init	ıal retu	ırn	type. See Specific	Number and street (or P O bo	x if mail is not delivered to street addi	ress) Room/suite	(408) 559-9		
┌ _{Ter}	mınatıd	on	Instruc- tions.	2105 S Bascom Ave			G Gross receipt	s \$ 52,683,452	
┌ Am	ended	return		City or town, state or country,	and ZIP + 4		1		
- Apr	lication	n pending		Campbell, CA 95008					
,			E Non	Land address of Principal	O #	1			
				ck Ferrer	Officer		is a group return ates?	for ┌Yes ┌No	
				Bascom Ave 220					
	v-even	npt status		ell, CA 95008) (3) ◀ (insert no)	N/1) or Γ 527	1	ll affiliates include		
					a)(1) or 527			See instructions)	
J W	eb sit	e: ► ww	w healthtru:	st org		H(c) Gro	up Exemption Nur	nder 🗲	
К Туре	e of or	ganızatıon	Corporat	cion trust association oth	ner 🕨	L Year of Fo	ormation 1996 M s	State of legal domicile CA	
Pai	rt I	Sum	mary						
	1			e organization's mission or	most significant activities				
9					Silicon Valley community to a				
ĕ		the hea	lthiest regi	on in America through three	e initiatives Healthy Living, He	althy Agıng ar	nd Healthy Comm	unities	
Governance	_								
Š	2		,		nued its operations or disposed				
	3		_		ody (Part VI, line 1a)			13	
8	4			_	governing body (Part VI, line 1	.b)		12	
Activities &	5			nployees (Part V, line 2a)			5 _	148 682	
ਤੂ ਤੂ	6			olunteers (estimate if neces			6 _		
•				iness taxable income from F	Part VIII, line 12, column (C)		7a _ 7b	1,041,644 -29,875	
	В	Net um	erated busi	mess taxable income nom i	om 990-1, me 34	Dei	or Year	Current Year	
	8	Contri	butions and	d grants (Part VIII, line 1h)	PII	5,005,306	5,227,352		
≘	9			revenue (Part VIII, line 2g)			1,925,440	2,820,131	
eu	10					•	2,083,618	-8,217,525	
Reven	Investment income (Part VIII, column (A), linOther revenue (Part VIII, column (A), lines 5				• • •		45,376	56,191	
	12		•	, , , , , , , , , , , , , , , , , , , ,	: equal Part VIII, column (A), lı	ne	,		
		12)					16,591,162	-113,851	
	13	Grants	s and simila	ar amounts paid (Part IX, co	lumn (A), lines 1-3)		2,891,735	2,888,457	
	14			or for members (Part IX, col				0	
83	15	Saları 10)	es, other co	ompensation, employee ben	efits (Part IX, column (A), lines	5 –	5,648,291	6,762,686	
Expenses	16a	•	sional fund	raising fees (Part IX, colum	ın (A), lıne 11e)		68,554	0	
÷	ь			penses, Part IX, column (D), line			,		
ш	17	•		(Part IX, column (A), lines 1			6,643,187	6,014,568	
	18				al Part IX, line 25, column (A))		15,251,767	15,665,711	
	19			penses Subtract line 18 fro			1,339,395	-15,779,562	
<u>%</u> ड						Beginn	ing of Year	End of Year	
Net Assets or Fund Balances	20	Total	assets (Par	rt X, line 16)			128,084,272	98,243,316	
Ass Ba	21		•	Part X, line 26)			6,271,600	4,543,364	
¥ 5	22			id balances Subtract line 2	1 from line 20		121,812,672	93,699,952	
	t II	_	ature Blo		- 110111 11110 <u>- 2</u> 0		121,012,072	33,633,332	
		_			ned this return, including accompanyir	ng schedules and	statements, and to th	ne best of my knowledge	
		and bel	ief, it is true, o	correct, and complete Declaration	of preparer (other than officer) is bas	sed on all informa	ition of which prepare	r has any knowledge	
Plea		****)-04-27		
Sign Here		Sign	ature of office	1		Date	:		
			Holtzman CFO e or print nam						
		 	от ринк пат	ic and the			1		
		Preparer signatur		1 Kıkuchı	Date	Check If self-	Preparer's PTIN (See Gen Inst)	
Paid			· F			empolyed 🕨			
Prepa			ame (or yours	RK Taylor & Associates	EIN 🕨	EIN •			
Use (אוווע		and ZIP + 4	2890 North Main St Suite 30.	5				
				Walnut Creek, CA 94597			Phone no 🕨		
Mayt	he IR	S discus	ss this retu	rn with the preparer shown a	above? (See instructions) .			┌ Yes	

Form 990 (2008)

Part III Statement of Program Service Accomplishments (See the instructions.)

Briefly describe the organization's mission

See Additional Data Table

2	Did the organization undertake any significant program services during the year which were not listed on	
	the prior Form 990 or 990-EZ?	┌ Yes ┌ N

If "Yes," describe these new services on Schedule O

Did the organization cease conducting or make significant changes in how it conducts any program Yes 🔽 No If "Yes," describe these changes on Schedule O

Describe the exempt purpose achievements for each of the organization's three largest program services by expenses Section 501(c)(3) and (4) organizations and 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a 6,602,411 including grants of \$) (Expenses \$ 1,682,066) (Revenue \$

The Healthy Communities Initiative pursues a variety of strategies aimed at reducing health disparities including (1) Addressing the Root Causes of Health Disparities, (2) Chronic Disease Prevention and Management, (3) Oral Health, and (4) Health Care Linkages. The program accomplishments and outcomes for each of these strategies are listed below --Addressing the Root Causes of Health Disparities. This strategy includes raising awareness about the root causes of health disparities and partnering with communities to address these root causes. One specific aspect focuses on increasing the diversity of healthcare professionals in the local workforce through pipeline programs that expose students to health careers. During FY 2009, 1,854 high school students from diverse backgrounds were informed about health professions and career paths with the goal of increasing diversity in the health professions. A total of 152 young people from diverse backgrounds were exposed to community health work through the Open Air Health Fair. In addition one Health Trust grant was awarded to develop and implement pipeline programs for increasing diversity in the health profession. Evergreen Community College Foundation was awarded a grant of \$51,000 to provide scholarships to ethnically diverse, low-income nursing program students to enable them to complete their RN degree at Evergreen and their BS in Nursing at San Jose State through concurrent enrollment. The primary goal of the project is to broaden the pool of bachelors-prepared, gender, ethnically and linguistically diverse nurses in Santa Clara County who provide culturally appropriate health care to underserved populations. Two additional grants were awarded that focused on a second aspect of this strategy partnering with communities to address the root causes of health disparities. A Health Trust grant of \$86,000 was awarded to the Santa Clara County Public Health Department to develop a Health Equity Report that will support the county's ability to address social determinants of health. The report will document the relationship between social and economic factors and health outcomes and will bring together multiple sectors in the process. The outcome of the report will be strategic data that provides a foundation for action to address local social determinants of health. A Health Trust grant of \$31,060 was awarded to the Islamic Networks Group, in conjunction with Santa Clara Valley Health and Hospital System (SCVHHS), to improve the cultural competency of health care practitioners and organizations with regard to the care of Muslim patients and to improve access to, and appropriate utilization of, primary and preventive health care for the Muslim population --Chronic Disease Prevention, Self-Management, and Management. This strategy has three main components. Community-based Chronic Disease Prevention, Chronic Disease Self-Management Classes, and AIDS Services. During FY 2009, 860 individuals received Chronic Disease Prevention Services through home- and community-based health education, resulting in increased knowledge about screening for and prevention of chronic diseases. Three grants were awarded in the chronic disease prevention and management area. El Camino Hospital Foundation in conjunction with El Camino Hospital was awarded \$60,000 to support a chronic illness case management program within RotaCare Free Clinics. Building on a pilot project that uses best practices for chronic disease management and prevention, the three year project uses a team approach to provide intensive, individualized care and case management for low-income, uninsured patients who have chronic illnesses [continued in 4d, below]

) (Expenses \$ 4b 2,671,094 including grants of \$ 501,229) (Revenue \$

The Healthy Aging Initiative was launched in January 2008, and with the exception of the Meals On Wheels program, the strategies are new to The Health Trust The Healthy Aging initiative strikes a balance between primary prevention for promoting the health and wellness of older adults and approaches that acknowledge the unique service needs of an aging society. The Initiative pursues a variety of strategies including (1) Aging Services Collaborative, (2) Physical Activity Opportunities, (3) Social Connection and Nutrition and (4) Caregiver Capacity Building Specific accomplishments and outcomes for each of these strategies are listed below --Aging Services Collaborative. The Health Trust coordinates and provides leadership to the Aging Services Collaborative, a "consortium of organizations" listed below --Aging Services Collaborative The Health Trust coordinates and provides leadership to the Aging Services Collaborative, a "consortium or organizations and individuals working together to provide leadership and build community-wide capacity to support, maintain, and promote the well-being of older adults and their caregivers in Santa Clara County "During FY 2009, 112 professionals and senior advocates, representing 73 organizations, participated in the collaborative During FY 2009, the collaborative completed a strategic plan and provided professional development trainings --Physical Activity Opportunities This strategy focuses on increasing the capacity of organizations to provide best practice physical activity programs to older adults. During FY 2009, The Health Trust held the Physical Activity Best Practices Symposium, which was attended by 178 individuals. Additionally, a compendium of best practices was written and distributed to organizations serving older adults. During FY 2009, Health Research for Action, in conjunction with SCVHHS, was awarded \$199,921 to adapt and develop English and Spanish versions of its award winning physical activity guide for use in promoting physical activity for adults aged 50 and over. Four grants for a total of \$69,934 were awarded to community organizations to implement best practice physical activity programs. These grants were complimented by a grant of \$28,474 to San Jose State University to provide technical assistance for best practice implementation to the grantees --Social Connection and Nutrition. The Health Trust operates a Meals On Wheels (MOW) program that provides home-delivered meals to seniors and people with disabilities. In FY 2009, 99,969 meals were delivered to a total of 688 unduplicated individuals. Ninety-six percent of the MOW recipients reported that the MOW services are good or excellent. Eighty-one percent reported that the MOW services were "extremely important" in helping them to remain in their homes --Caregiver Capacity Building The Caregiver strategy was carried out in association with the Aging Services Collaborative (see above) During FY 2009, two grants were awarded to organizations to support caregivers. The Hispanic Foundation Silicon Valley, in conjunction with SCVHHS, was awarded a matching grant of \$26,000 to provide culturally competent services to Hispanic elders and their caregivers. The funding will also raise the awareness of caregiver issues in Santa Clara County. A second grant of \$51,000 was awarded to the Alzheimer's Activity Center, in conjunction with SCVHHS, to incorporate a caregiver wellness component into all of the grantee's programs

1,844,774 including grants of \$ 705,162) (Revenue \$ (Code) (Expenses \$

relies on leadership, partnerships, advocacy and policy development. Currently, three strategies have been prioritized within the Initiative including (1) Community. Gardens and Sustainable Agriculture, (2) Inclusion of Health Elements in General Plans, and (3) Organizational Wellness. A prior-year strategy, Healthy Silicon Valley, is no longer being led by The Health Trust, but a grant in the amount of \$134,284 was made to the new fiscal sponsor, YMCA of Silicon Valley, in conjunction with SCVHHS, to support the strategy Specific accomplishments and outcomes for each of the Healthy Living Initiative strategies are listed below --Community Gardens and Sustainable Agriculture. This strategy focuses on promoting and supporting community gardens and sustainable agriculture in the region. Community/school gardens and projects involving urban/sustainable farming offer participants ways to be physically active, produce fruit and vegetables and serve as places to educate children, families and other community residents about healthy eating During FY 2009, a grant in the amount of \$51,000 was made to Sacred Heart Community Services, in conjunction with SCVHHS, for the La Mesa Verde Home Garden Program. This innovative program is creating 100 home gardens for very low-income Latino residents in San Jose to increase residents' access to and consumption of fresh, organic, healthy produce. During FY2009, The Health Trust was awarded an AmeriCorps grant that has placed 46 AmeriCorps members with 10 partner garden organizations with the goal of increasing access to and consumption of fruits and vegetables in low-income neighborhoods --General Plans-Health Element This strategy focuses on educating and advocating for municipalities to include a health element in their required general plans with the goal of creating increased opportunities for healthy nutrition and physical activity and encouraging creation of environments or infrastructure that promote access to healthy foods and facilitate physical activity During FY 2009, The Health Trust made significant progress in advocating for health policies in the Cities of Mountain View, San Jose, and Santa Clara Two grants were awarded to advance this strategy. A grant in the amount of \$61,880 was made to the City of Mountain View, in conjunction with SCVHHS, to analyze and incorporate comprehensive health policies and integrate those policies throughout all elements of the General Plan. A grant in the amount of \$76,000 was made to the Greenbelt Alliance, in conjunction with SCVHHS, to conduct research and advocacy and promote planning and zoning policies that support healthy lifestyles in General Plans --Organizational Wellness This strategy aims to change organizational environments and policies to promote and support healthy behaviors. During FY2009, two grants were made in the area of organizational wellness for a total of \$74,695 A grant was made to InnVision Healthcare, in conjunction with SCVHHS, for the Homeless Program to integrate nutrition, health and wellness activities and education throughout the organization, serving both staff and clients, and a grant was made to Anzar High School, in conjunction with SCVHHS, to improve the school lunch program by including more fresh and healthy foods through a year-long pilot project with the Advanced Culinary Arts class The class partners with local growers and the school's organic garden to source fresh produce and works with the School District's

Other program services (Describe in Schedule O)

Total program service expenses \$

4e

(Expenses \$

1,143,780 including grants of \$) (Revenue \$

Must equal Part IX, Line 25, column (B).

12,262,059

)

Part IV	Checkli	st of	Required	Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	1	Yes	
2	Is the organization required to complete Schedule B, Schedule of Contributors? 🕏	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3		No
4	Section 501(c)(3) organizations Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II	4	Yes	
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III	5		No
6	Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II	7		Νο
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8		No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV	9		No
10	Did the organization hold assets in term, permanent,or quasi-endowments? If "Yes," complete Schedule D, Part V	10	Yes	
11	Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable	11	Yes	
12	Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? If "Yes," complete Schedule D, Parts XI, XII, and XIII .	12	Yes	
13	Is the organization a school as described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13		No
14a	Did the organization maintain an office, employees, or agents outside of the U S ?	14a		Νο
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U S ? If "Yes," complete Schedule F, Part I	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>	15		No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If</i> "Yes," complete Schedule F, Part III	16		No
17	Did the organization report more than \$15,000 on Part IX, column (A), line 11e? If "Yes," complete Schedule G, Part I	17		No
18	Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	Yes	
19	Did the organization report more than \$15,000 on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19		No
20	Did the organization operate one or more hospitals? If "Yes," complete Schedule H	20		Νο
21	Did the organization report more than \$5,000 on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II	21	Yes	
22	Did the organization report more than \$5,000 on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III	22		No
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? If "Yes," complete Schedule J	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		Νο
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		No
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		Νο
25a	Section $501(c)(3)$ and $501(c)(4)$ organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I	25a		No
b	Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? If "Yes," complete Schedule L, Part I	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? If "Yes," complete Schedule L, Part II	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27		No

Part IV Checklist of Required Schedules (Continued)

			Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee			
а	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? If "Yes," complete Schedule L, Part			
		28a		Νo
b	Have a family member who had a direct or indirect business relationship with the organization? If "Yes," complete Schedule L, Part IV	28b		No
С	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? If "Yes," complete Schedule L, Part IV.	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 🕏	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32		Νo
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations section 301 7701-2 and 301 7701-3? <i>If</i> "Yes," complete Schedule R, Part I	33		No
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1	34		No
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2	35		No
36	501(c)(3) organizations Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2	36		Νο
37	Did the organization conduct more than 5 percent of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI	37		Νo

Pa	rt V Statements Regarding Other IRS Filings and Tax Compliance			. 490 -
			Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal			
	of U.S. Information Returns. Enter -0- if not applicable			
	1a 229			
D	Enter the number of Forms W-2G included in line 1a Enter -0- if not applicable 1b 0			
С	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable			
-	gaming (gambling) winnings to prize winners?	1c		No
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements filed for the calendar year ending with or within the year covered by this return			
ь	If at least one is reported in 2a, did the organization file all required federal employment tax returns?			
	Note: If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return.	2b	Yes	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	3a	Yes	
ь	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	3b	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority			
	over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a		No
b	If "Yes," enter the name of the foreign country			
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.			
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b		No
С	If "Yes," to 5a or 5b, did the organization file Form 8886-T, <i>Disclosure by Tax-Exempt Entity Regarding Prohibited</i> Tax Shelter Transaction?	5c		No
6a	Did the organization solicit any contributions that were not tax deductible?	6a		Νo
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b		No
7	Organizations that may receive deductible contributions under section 170(c).			
а	Did the organization provide goods or services in exchange for any quid pro quo contribution of \$75 or more?	7a	Yes	<u> </u>
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	Yes	
С	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to	7c		N o
d	If "Yes," indicate the number of Forms 8282 filed during the year	,,,		110
е	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f		No
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?	7g		No
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as			
	required?	7h		No
8	Section $501(c)(3)$ and other sponsoring organizations maintaining donor advised funds and section $509(a)(3)$ supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8		No
9	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.			
а	Did the organization make any taxable distributions under section 4966?	9a		No
ь	Did the organization make a distribution to a donor, donor advisor, or related person?	9b		No
10	Section $501(c)(7)$ organizations. Enter			
а	Initiation fees and capital contributions included on Part VIII, line 12 10a			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities			
11	Section 501(c)(12) organizations Enter			
	Gross income from members or shareholders			
	Construction of the state of th			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)			
12-	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12-		N o
	If "Yes," enter the amount of tax-exempt interest received or accrued during the	444		110
	year 12b			

Part VI Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

Section	Δ	Governing	Body	and	Management	
Jection	М.	GOVEL HILLIG	Doug	allu	Management	

					_		Yes	NO
	For each "Yes" response to lines 2-7 below, and for a "No" response to lines 8 or 9b below processes, or changes in Schedule O. See instructions.	, desc	ribe the	cırcumsta	ances,			
1a	Enter the number of voting members of the governing body	1a			13			
Ь	Enter the number of voting members that are independent	1b			12			
2	Did any officer, director, trustee, or key employee have a family relationship or a bus other officer, director, trustee, or key employee?					2		Νο
3	Did the organization delegate control over management duties customarily performe supervision of officers, directors or trustees, or key employees to a management con					3		Νο
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?							
5	Did the organization become aware during the year of a material diversion of the organization's assets?							
6	Does the organization have members or stockholders?							
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?							Νο
Ь	Are any decisions of the governing body subject to approval by members, stockhold		7b		Νo			
8	Did the organization contemporaneously document the meetings held or written active year by the following	ons ui	ndertake	en during	the			
а	the governing body?				.	8a	Yes	
Ь	each committee with authority to act on behalf of the governing body?				[8b	Yes	
9a	Does the organization have local chapters, branches, or affiliates?				. [9a		Νο
b	If "Yes," does the organization have written policies and procedures governing the adaffiliates, and branches to ensure their operations are consistent with those of the or			•	, ,	9b		Νο
10	Was a copy of the Form 990 provided to the organization's governing body before it was the describe in Schedule O the process, if any, the organization uses to review the			-		10	Yes	
11	Is there any officer, director or trustee, or key employee listed in Part VII, Section Athe organization's mailing address? If "Yes," provide the names and addresses in Sc	,				11		Νο

Section B. Policies

			Yes	No
12a	Does the organization have a written conflict of interest policy? If "No", go to line 13 \cdot .	12a	Yes	
Ь	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	Yes	
13	Does the organization have a written whistleblower policy?	13	Yes	
14	Does the organization have a written document retention and destruction policy?	14	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision			
а	The organization's CEO, Executive Director, or top management official?	15a	Yes	
b	Other officers or key employees of the organization?	15b	Yes	
	Describe the process in Schedule O			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable Federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b		No
		TOD		Νo

Section C. Disclosure

- 17 List the States with which a copy of this Form 990 is required to be filed CA
- Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c) (3)s only) available for public inspection. Indicate how you make these available. Check all that apply own website.

 upon request
- 19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public See Additional Data Table
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization Ira Holtzman

2105 S Bascom Ave Suite 220 Campbell, CA 95008

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Section A Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed

Check this box if the organization did not compensate any officer, director, trustee or key employee

- * List all of the organization's **current** officers, directors, trustees (whether individuals or organizations) and key employees regardless of amount of compensation, and current key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid
- * List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations
- * List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- * List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

The check this box in the organization and i	(B) Average hours per week	Posit	(C) chec	:k al				(E)	(F)
(A) Name and Title		Individual Trustee or Chrector	Institutional Trustee	Officei	Key employee	Highest compensated employee	Former	(D) Reportable compensation from the organization (W- 2/1099MISC)	Reportable compensation from related organizations (W- 2/1099- MISC)	Estimated amount of other compensation from the organization and related organizations
							-			

Part VIII Continued

	(B) Average hours per week		tion that a			II			(E)	(F)
(A) Name and Title		Individual Trustee or Director	Institutional Trustee	Officei	Key employee	Highest compensated	Former	(D) Reportable compensation from the organization (W- 2/1099MISC)	Reportable compensation from related organizations (W- 2/1099- MISC)	Estimated amount of other compensation from the organization and related organizations
			1	Н	\dashv					
					\dashv					
					-					
					-					
					\Box					
		-	+	Н	\dashv		Н			
1b Total							+	1,200,057	7	159,307
2 Total number of individuals (including	those in 1	a) who	recei	ved	more	e thar	n \$ 1	00.000 in reportabl	<u>.</u>	•

Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization ►7

			Yes	No			
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee						
	on line 1a? If "Yes," complete Schedule J for such individual	3	Yes				
4	For any individual listed online 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule I for such						
	ındıvıdual	4	Yes				
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services						
	rendered to the organization? If "Yes," complete Schedule J for such person	5		Νo			

Section B. Independent Contractors

Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization

(A) Name and business address	(B) Description of services	(C) Compensation
McNutt & Company 27 Jackson St Los Gatos, CA 95030	PR Consultant	118,215
Graystone Consulting 111 Santa Rosa Ave Suite 200 Santa Rosa, CA 95404	Investment Advisory	106,474
Cross Connect Systems 1648 Alison Ave Mountain View, CA 94040	IT services	114,048
Cobe Construction 2470 Winchester Blvd Suite D Campbell, CA 95008	Construction	105,518
Total number of independent contractors (including those in 1) who rec	, ,	4

Statement of Revenue

					(A) Total Revenue	(B) Related or Exempt Function Revenue	(C) Unrelated Business Revenue	(D) Revenue Excluded from Tax under IRC 512, 513, or 514
	1a	Federated can	npaigns 1a	51,648		Nevenue		J.E., J.E., OI 314
Contributions, gifts, grants and other similar amounts	b	Membership d	ues					
gra	c	Fundraisina ev	1b /ents	33,557				
fts,			1 c					
<u> </u>	d		izations1d					
ons sín	e	Government gran		3,328,609 1,813,538			-	ļ
her f	f	sımılar amounts n	tions, gifts, grants, and not included above					
trit Tot	g	Noncash conti	1f rıbutıons ıncluded ın					
and		lines 1a-1f \$	184,619					
	h	Total (Add line	es 1a-1f) . . .		5,227,352			
വ				Business Code				
inua	2a	Nonprofit Support			1,141,644	100,000	1,041,644	
Re v	Ь	Health Trust Prog			805,915	805,915		
93	C	Discontinued Ops			872,572	872,572		
Ker.	d							
an (e f	Λ II othor ====	ram carulea ravarri					
Program Serwce Revenue	.	An other progr	ram service revenue					
Ě	g	Total. Add line ▶ \$ 2,820,131	es 2a-2f					
	3		come (ıncludıng dıvı	dends, interest				
		other sımılar a	amounts)		3,351,220			3,351,220
	4	Income from inve	estment of tax-exempt b	ond proceeds	0			
	5	Royalties .		•	0			
		Royalties .	(ı) Real	(II) Personal				
	6a	Gross Rents	153,210					
	b	Less rental expenses	96,169					
	с	Rental income or (loss)	57,041					
	d		ome or (loss)		57,041			57,041
			(ı) Securities	(II) O ther				
	7a	Gross amount from sales of	41,098,991	, ,				
		assets other than inventory						
	b	Less cost or	52,667,736					
		other basis and sales expenses						
	С	Gain or (loss)	-11,568,745		11 560 745			-11,568,745
	d	Net gain or (lo	· · · · ·	. •	-11,568,745			-11,566,745
	8a		from fundraising					
		events (not inc \$3	2,548					
uue			ns reported on line					
•			e G if total exceeds					
Ϋ́.			a	33,337				
Other Revenue	Ь		xpensesb (loss) from fundrais		-850			-850
ō	C			Ing events	-030			-030
	9a		part IV, line 19					
		Complete Schedexceeds \$15,00						
		CACCCGG \$15,00	a					
	b	Less directe	xpensesb					
	С		(loss) from gaming	activities •	0			
	10a		f ınventory, less	-				
		returns and all	lowances . a					
	ь	Less cost of g						
	С		(loss) from sales of		0			
		Mıscellaneou		Business Code				
	11a							_
	b							
	С							
	d	All other rever	nue					
	е	Total. Add line	es 11a-11d	\$				
	12	Total Revenue	Add lines 1h, 2g, 3		-113,851	1,778,487	1,041,644	-8,161,334
		8c,						
	J	ec, iuc, and 1	l1e					Form 990 (2008)

Part IX Statement of Functional Expenses

A	Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).						
Do ı	not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses		
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	2,888,457	2,888,457				
2	Grants and other assistance to individuals in the U.S. See Part IV, line 22	0					
3	Grants and other assistance to governments, organizations and individuals outside the U S See Part IV, lines 15 and 16	0					
4	Benefits paid to or for members	0					
5	Compensation of current officers, directors, trustees, and key employees	619,620	149,516	390,205	79,899		
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0					
7	Other salaries and wages	4,223,027	3,389,353		371,058		
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	326,493	247,895	51,640	26,958		
9	Other employee benefits	1,189,594	903,217	188,155	98,222		
10	Payroll taxes	403,952	305,443	65,126	33,383		
11	Fees for services (non-employees)						
а	Management	0					
b	Legal	74,420	36,832	34,851	2,737		
c	Accounting	39,553	19,576	18,523	1,454		
d	Lobbying	0					
e	Professional fundraising See Part IV, line 17	0					
f	Investment management fees	655,015		655,015			
g	Other	419,577	207,658	196,490	15,429		
12	Advertising and promotion	10,429	3,118	6,712	599		
13	Office expenses	639,944	555,277	67,801	16,866		
14	Information technology	0					
15	Royalties	0					
16	Occupancy	949,590	720,574	147,326	81,690		
17	Travel	154,467	124,577	26,871	3,019		
18	Payments of travel or entertainment expenses for any Federal, state or local public officials	0					
19	Conferences, conventions and meetings	0					
20	Interest	0					
21	Payments to affiliates	0					
22	Depreciation, depletion, and amortization	370,831	280,863	74,814	15,154		
23 24	Insurance	79,444	8,158	71,286			
а	Purchased services	2,322,509	2,145,230	149,312	27,967		
b	Printing and Publications	77,561	67,299	8,218	2,044		
c	Other	254,626	209,016	22,494	23,116		
d	Offsets to revenue (rents,F/R)	-33,398			-33,398		
f	All other expenses	0					
25	Total functional expenses. Add lines 1 through 24f	15,665,711	12,262,059	2,637,455	766,197		
26	Joint Costs. Check if following SOP 98-2 Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation						

Part X	Balance	Sheet

						(A) Beginning of year		(B) End of year
	1	Cash—non-interest-bearing			_	2,196,570	1	2,379,119
	2	Savings and temporary cash investments			·		2	0
	3	Pledges and grants receivable, net			3	0		
	4	Accounts receivable, net				1,341,532	4	1,091,705
	5	Receivables from current and former officers, directors, trustees other related parties Complete Part II of Schedule L			or	, ,	5	0
	6	Receivables from other disqualified persons (as defined under se persons described in section 4958(c)(3)(B) Complete Part II of S	ction	4958(f)(1)) and		6	0
	7	Notes and loans receivable, net					7	0
	8	Inventories for sale or use					8	0
90	9	Prepaid expenses and deferred charges				153,796	9	203,299
ssets	10a							
AS	_	Land, buildings, and equipment cost basis	10a	6,6	87,464			
	Ь	Less accumulated depreciation <i>Complete Part VI of</i> Schedule D	10Ь	1,3	64,270	5,139,972	10c	5,323,194
	11	Investments—publicly traded securities			·	102,694,703		66,880,619
	12	Investments—other securities See Part IV, line 11 Complete Part Schedule D				14,987,507	12	20,979,756
	13	Investments—program-related See Part IV, line 11 Complete Part of Schedule D.			13	0		
	14	Intangible assets			14	0		
	15	Other assets See Part IV, line 11 Complete Part IX of Schedule D		1,570,192	15	1,385,624		
	16	Total assets. Add lines 1 through 15 (must equal line 34)				128,084,272		98,243,316
	17	Accounts payable and accrued expenses .				1,628,633	17	1,251,346
	18	Grants payable				2,651,884	18	2,600,198
	19	Deferred revenue					19	
	20	Tax-exempt bond liabilities					20	
eS	21	Escrow account liability Complete Part IV of Schedule D		•			21	
Liabilities	22	Payable to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified						
Lia		persons Complete Part II of Schedule L			22			
	23	Secured mortgages and notes payable to unrelated third parties			23			
	24	Unsecured notes and loans payable					24	
	25	Other liabilities Complete Part X of Schedule D		1,991,083	25	691,820		
	26	Total liabilities. Add lines 17 through 25				6,271,600	26	4,543,364
s e e		Organizations that follow SFAS 117, check here ► ✓ and complethrough 29, and lines 33 and 34.	ete li	nes 27				
Balance	27	Unrestricted net assets				118,593,316	27	90,745,698
80	28	Temporarily restricted net assets				2,777,896	28	2,548,057
<u> </u>	29	Permanently restricted net assets		441,460	29	406,197		
r Fund		Organizations that do not follow SFAS 117, check here ► ☐ and lines 30 through 34.						
s or	30	Capital stock or trust principal, or current funds			30			
Assets	31	Paid-in or capital surplus, or land, building or equipment fund .			31			
AS	32	Retained earnings, endowment, accumulated income, or other fur			32			
Net	33	Total net assets or fund balances				121,812,672	33	93,699,952
_	34	Total liabilities and net assets/fund balances				128,084,272	34	98,243,316
		L Elizabeta Charles and a control of the control of						
Pa	rt XI	Financial Statements and Reporting						

Dowl VI	Financial	Ctatamanta	and Reporting
7.11.5	l Financiai	Statements	and Reporting

			Yes	No
1	Accounting method used to prepare the Form 990			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		Νo
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
c	If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
3а	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a	Yes	
b	If "Yes," did the organization undergo the required audit or audits?	3b	Yes	

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DLN: 93493117008040

OMB No 1545-0047

Open to Public Inspection

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury Internal Revenue Service

To be completed by all section 501(c)(3) organizations and section 4947(a)(1)

Public Charity Status and Public Support

nonexempt charitable trusts. Attach to Form 990 or Form 990-F7. See separate instructions.

Name of the organization Employer identification number The Health Trust 94-6050231 Reason for Public Charity Status (to be completed by all organizations) (See Instructions) organization is not a private foundation because it is (Please check only **one** organization) A church, convention of churches, or association of churches described in Section 170(b)(1)(A)(i). A school described in **Section 170(b)(1)(A)(ii).** (Attach Schedule E) A hospital or a cooperative hospital service organization described in Section 170(b)(1)(A)(iii). (Attach Schedule H) A medical research organization operated in conjunction with a hospital described in Section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state An organization operated for the benefit of a college or university owned or operated by a governmental unit described in Section 170(b)(1)(A)(iv). (Complete Part II) A federal, state, or local government or governmental unit described in Section 170(b)(1)(A)(v). An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in Section 170(b)(1)(A)(vi) (Complete Part II) A community trust described in Section 170(b)(1)(A)(vi) (Complete Part II) An organization that normally receives (1) more than 331/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 331/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See Section 509(a)(2). (Complete Part III) 10 An organization organized and operated exclusively to test for public safety. See Section 509(a)(4). (See instructions.) An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See Section 509(a)(3). Check the box that describes the type of supporting organization and complete lines 11e through 11h **b** Type II c Type III - Functionally Integrated d Type III - Other By checking this box. I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons? (i) a person who directly or indirectly controls, either alone or together with persons described in (ii) Yes No and (III) below, the governing body of the the supported organization? 11g(i) (ii) a family member of a person described in (i) above? 11q(ii) (iii) a 35% controlled entity of a person described in (i) or (ii) above? 11q(iii) Provide the following information about the organizations the organization supports h

(i) Name of Supported Organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (See Instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		n organization in		(vii) A mount of support?
			Yes	No	Yes	No	Yes	No	
Total									

Part II	Support Schedule for Organizations Described in IRC 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
	(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Pι	ıblic Support		, ,	,				
Cale	endar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e)	2008	(f) Total
1	Gifts, grants, contributions, and							
	membership fees received (Do not							
	include any "unusual grants ")							
2	Tax revenues levied for the organization's							
	benefit and either paid to or expended on							
_	its behalf The value of services or facilities					 		
3	furnished by a governmental unit to the							
	organization without charge							
4	Total. Add line 1-3					1		
5	The portion of total contribution by each							
5	person (other than a government unit or							
	publicly supported organization) included							
	on line 1 that exceed 2% of the amount							
	shown on line 11, column							
	· (f)							
6	Public Support subtract line 5 from line							
	4							
	otal Support		1		T			
	endar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) :	2008	(f) Total
7	A mounts from line 4							
8	Gross income from interest, dividends,							
	payments received on securities loans,							
	rents, royalties and income from similar							
_	sources							
9	Net income from unrelated business							
	activities, whether or not the business is regularly carried on							
10	Other income Do not include gain or loss							
10	from the sale of capital assets (Explain in							
	Part IV)							
11	Total Support (Add lines 7 through 10)							
12	Gross receipts from related activities, etc	(See instructio	ns)		•	12		
13	First Five Years. If the Form 990 is for the	organization's f	irst second thu	d fourth or fifth	ntay vearas a F		3)	
	organization, check this box and stop here		mat, second, tim	u, rouren, or mer	rtax year as a s	/O1(C)(C	• •	▶ □
								•
Co	omputation of Public Support Perc	entage						
14	Public Support Percentage for 2008 (line 6	5 column (f) dıvı	ded by line 11 c	olumn (f))		14		
15	Public Support Percentage for 2007 School	dule A , Part IV -	A, line 26f			15		
16a	33 1/3% Test - 2008. If the organization di	d not check the	box on line 13.	and line 14 is 3	3 1/3% or more.		this box	
	and stop here. The organization qualifies a				,			▶ □
b	33 1/3% Test - 2007. If the organization d				15 is 33 1/3% d	r more,	check th	
	box and stop here. The organization qualifi	es as a publicly	supported orga	nızatıon				▶ □
17a	10% Facts and Circumstances Test - 2008.							
	more, and if the organization meets the "fa		•					· —
	organization meets the "facts and circums							► □
Ь	10% Facts and Circumstances Test - 2007.							
	more, and if the organization meets the "fa		•					_
4.0	the organization meets the "facts and circu							n ▶
18	Private Foundation. If the organization did	not check the b	oux on line 13, 1	oa, 100, 1/a or	1/D, Check this	oox an	u see	▶ □
	ınstructions							F-1

Support Schedule for Organizations Described in IRC 509(a)(2) Part III

	(Complete only if you check	tea the box of	i line 9 of Part	1.)			
	ction A. Public Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
1	Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants")	5,548,501	5,329,071	5,087,916	5,005,306	5,244,339	26,215,133
2	Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's taxexempt purpose	2,964,048	1,541,634	1,526,335	1,222,020	1,778,487	9,032,524
3	Gross receipts from activities that are not an unrelated trade or business under section 513						0
4	Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0
5	The value of services or facilities furnished by a governmental unit to the organization without charge						0
6	Total Add lines 1-5	8,512,549	6,870,705	6,614,251	6,227,326	7,022,826	35,247,657
7a	A mounts included on lines 1, 2, and 3						0
b	received from disqualified persons Amounts included on lines 2 and 3 received from other than disqualified						0
	persons that exceed the greater of 1% of the total of lines 9, 10c, 11, and 12 for the year or \$5,000						
С	Total of lines 7a and 7b						
8	Public Support (Substract line 7c from line 6)						35,247,657
	tal Support						
Cale	ndar year (or fiscal year beginning in)	(a) 2004	(b) 2005	(c) 2006	(d) 2007	(e) 2008	(f) Total
9	A mounts from line 6	8,512,549	6,870,705	6,614,251	6,227,326	7,022,826	35,247,657
10a	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	2,924,258	2,622,562	2,258,599	2,241,668	3,504,430	13,551,517
b	Unrelated business taxable income (less section 511 taxes) from businesses acquired after 30 June, 1975						0
С	Add lines 10a and 10b	2,924,258	2,622,562	2,258,599	2,241,668	3,504,430	13,551,517
11	Net income from unrelated business			, ,			· · ·
	activities not included in line 10b, whether or not the business is regularly carried on						0
12	Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)						0
13	Total Support (Add lines 9, 10c, 11 and 12)						48,799,174
14	First Five Years If the Form 990 is for the o	rganızatıon's fir	st, second, third	, fourth, or fifth	tax year as a 50	01(c)(3) organız	ation,

check this box and stop here

Computation of Public Support Percentage

15 Public Support Percentage for 2008 (line 8 column (f) divided by line 13 column (f))

Public Support Percentage for 2007 Schedule A, Part IV-A, line 27g

15	72 230 %
16	74 530 %

Computation of Investment Income Percentage

17 Investment Income Percentage for 2008 (line 10c column (f) divided by line 13 column (f))

Investment Income Percentage from 2007 Schedule A, Part IV-A, line 27h

17	27 770	%
18	25 470	%

19a 33 1/3% Tests - 2008. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

33 1/3% Tests - 2007. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here. The organization qualifies as a publicly supported organization

Private Foundation If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions



►V

Part IV	Supplemental Information. Complete this part to provide the information required by Part II, line 10; Part II, line 17a or 17b, or Part III, line 12. Provide and any other additional information. (see instructions)					
	Facts and Circumstances Test					

Schedule A (Form 990 or 990-EZ) 2008

SCHEDULE C

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

OMB No 1545-0047

Open to Public Inspection

To be completed by organizations described below. Attach to Form 990 or Form 990-EZ

If the organization answered "Yes," to Form 990, Part IV, Line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities)

- ◆ Section 501(c)(3) organizations complete Parts I-A and B Do not complete Part I-C
- ◆ Section 501(c) (other than section 501(c)(3)) organizations complete Parts I-A and C below Do not complete Part I-B
- ◆ Section 527 organizations complete Part I-A only

If the organization answered "Yes," to Form 990, Part IV, Line 4, or Form 990EZ, Part VI, line 47 (Lobbying Activities)

- ◆ Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) complete Part II-A Do not complete Part II-B
- ◆ Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

	ne organization answered "Ye ection 501(c)(4), (5), or (6) organi	s," to Form 990, Part IV, Line 5 (F	Proxy Tax)	. , ,		'	
N a	ame of the organization	Zationio Gompioto Fait III		Employer ider	ntıfıcat	ion numbe	er
The	e Health Trust			94-6050231			
Pai		oy all organizations exempt e the instructions for Schedule					
1	Provide a description of the or	ganızatıon's dırect and ındırect polıt	cical campaign act	tivities in Part IV			
2	Political expenditures				\$		
3	V olunteer hours						
Pai	rt I-B To be completed be for Schedule C for d	oy all organizations exempt etails.)	under sectio	n 501(c)(3). (See the	ınstru	ictions	
1	Enter the amount of any excise	e tax incurred by the organization ui	nder section 4955	5	\$		
2	Enter the amount of any excise tax incurred by organization managers under section 4955						
3	If the organization incurred in	a section 4955 tax, did it file Form	4720 for this year	r?		☐ Yes	✓ No
4a	Was a correction made?					☐ Yes	✓ No
ь	b If "Yes," describe in Part IV						
Pa		by all organizations exempt for Schedule C for details.)	under sectio	n 501(c), except sec	tion 5	501(c)(3	3).
1	Enter the amount directly expe	ended by the filing organization for s	ection 527 exem	pt function activities	\$		
2	Enter the amount of the filing of 527 exempt funtion activities	organization's internal funds contrib	uted to other orga	nizations for section	\$		
3	Total of direct and indirect exe 1120-POL, line 17b	empt function expenditures Add line	es 1 and 2 and en	ter here and on Form	\$		
4	Did the filing organization file $f I$	Form 1120-POL for this year?				☐ Yes	┌ No
5	were made Enter the amount p political contributions received	nd Employer Identification Number of and indicate if the amount was of and promptly and directly delivered action committee (PAC) If additions	paid from the filing d to a separate po	g organization's own interna olitical organization, such a	alfunds isase	or were	nents
	(a) Name	(b) Address	(c) EIN	(d) A mount paid from filing organization's internal funds If none, enter -0-	con a dıre	A mount o tributions nd prompt ectly deliv eparate po anization enter -	received tly and ered to a olitical If none,
					1		

section 4911 tax for this year?

┌ Yes ┌ No

Р		organizations exempt under section 501(c tion 501(h)). (See the instructions for Schedule		68
A	Check If the filing organization	belongs to an affiliated group	-	
В	Check If the filing organization	checked box A and "limited control" provisions apply		
		bbying Expenditures— s" means amounts paid or incurred.)	(a) Filing O rganization's Totals	(b) A ffiliated Group Totals
1a	Total lobbying expenditures to influe	nce public opinion (grass roots lobbying)	5,200	
b	Total lobbying expenditures to influe	nce a legislative body (direct lobbying)	545	
c	Total lobbying expenditures (add line	es 1a and 1b)	5,745	
d	Other exempt purpose expenditures		15,921,754	
е	Total exempt purpose expenditures	(add lines 1c and 1d)	15,927,499	
f	columns—	he amount from the following table in both	946,375	
	If the amount on line 1e, column (a) or (b) is: Not over \$500,000	The lobbying nontaxable amount is: 20% of the amount on line 1e		
	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000		
	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000		
	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000		
	Over \$17,000,000	\$1,000,000		
 g	Grassroots nontaxable amount (ente	r 25% of line 1f)	236,594	
h	Subtract line 1g from line 1a Enter -	0- ıf lıne g ıs more than lıne a		
i	Subtract line 1f from line 1c Enter -	O- if line f is more than line c		

4-Year Averaging Period Under Section 501(h) (Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 1a through 1f of the instructions.)

j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting

	Lobbying Expenditures During 4-Year Averaging Period					
	Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) Total
2a	Lobbying non-taxable amount	821,914	880,415	919,682	946,375	3,568,386
b	Lobbying ceiling amount (150% of line 2a, column(e))					5,352,579
c	Total lobbying expenditures			2,500	5,745	8,245
d	Grassroots non-taxable amount	205,479	220,104	229,921	236,594	892,098
e 	Grassroots ceiling amount (150% of line d, column (e))					1,338,147
f	Grassroots lobbying expenditures				5,200	5,200

	5768 (election under section 501(h)). (See the instructions for Schedule C for d					
		(a	1)		(b)	
	·	Yes	No	A	moun	nt
1	During the year, did the filing organization attempt to influence foreign, national, state or local					
	legislation, including any attempt to influence public opinion on a legislative matter or					
а	referendum, through the use of Volunteers?					
ь				1		
c	Media advertisements?					
d	Mailings to members, legislators, or the public?					
e	Publications, or published or broadcast statements?					
f						
g	Direct contact with legislators, their staffs, government officials, or a legislative body?					
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means?					
i	Other activities If "Yes," describe in Part IV					
j	Total lines 1c through					
-	1) Did the patientias in line 1 agree the arrangements in the net decombed in section FO1/a)/2)2		Ī	1		
	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)? If "Yes" enter the amount of any tax incurred under section 4912			+		
	If "Yes" enter the amount of any tax incurred by organization managers under section 4912					
	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?					
	t III-A To be completed by all organizations exempt under section 501(c)(4), sec	tion	5016) or	
G.	section 501(c)(6). (See the instructions for Schedule C for details.)		301(,, 0.	
			_		Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?		L	1		
2	Did the organization make only in-house lobbying expenditures of \$2,000 or less?		L	2		<u> </u>
3	Did the organization agree to carryover lobbying and political expenditures from the prior year?			3		
Par	t III-B To be completed by all organizations exempt under section 501(c)(4), sec					
	section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered "No" (question 3 is answered "Yes." (See the instructions for Schedule C for details.)	OK II	Part	III-A	٠,	
1	Dues, assessments and similar amounts from members	T	1 \$			
2	Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political	F	'			
	expenses for which the section 527(f) tax was paid).					
	Current Year		2a \$			
b	Carryover from last year		2b\$			
C	Total	<u> </u>	2c \$			
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	-	3 \$			
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political					
	expenditure next year?		4 \$			
5	Taxable amount of lobbying and political expenditures (line 2c total minus 3 and 4)		5 \$			
Pā	Supplemental Information	•				
	mplete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and F so, complete this part for any additional information	Part II	l-B, line	e 1ı		
	Identifier Return Reference Explanation	on				

Part IV Supplemental I	Part IV Supplemental Information				
Ident if ier	Return Reference	Explanation			

Schedule C (Form 990 or 990EZ) 2008

OMB No 1545-0047

Open to Public Inspection

SCHEDULE D

(Form 990)

Department of the Treasury Internal Revenue Service

The Health Trust

Supplemental Financial Statements

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

Employer identification number Name of the organization 94-6050231

Pa	organizations Maintaining Donor Action organization answered "Yes" to Form 99		unds or Accounts. Complete if the		
	organización anomerea reo co rorm 93	(a) Donor advised funds	(b) Funds and other accounts		
1	Total number at end of year				
2	Aggregate Contributions to (during year)				
3	Aggregate Grants from (during year)				
4	Aggregate value at end of year				
5	Did the organization inform all donors and donor advi funds are the organization's property, subject to the		or advised Yes No		
6	Did the organization inform all grantees, donors, and used only for charitable purposes and not for the benimpermissible private benefit?		·		
Pai	t II Conservation Easements. Complete	ıf the organization answered "Yes" to	o Form 990, Part IV, line 7.		
1	Purpose(s) of conservation easements held by the o Preservation of land for public use (e.g., recreate Protection of natural habitat Preservation of open space	ion or pleasure)	historically importantly land area rtified historic structure		
2	Complete lines 2a-2d if the organization held a qual on the last day of the tax year	ıfıed conservatıon contrıbutıon ın the form	of a conservation easement Held at the End of the Year		
а	Total number of conservation easements		2a		
b		_	2b		
	Total acreage restricted by conservation easement				
с	Number of conservation easements on a certified h		2c		
d	Number of conservation easements included in (c)	acquired after 8/17/06	2d		
3	Number of conservation easements modified, transfe	erred, released, extinguished, or terminate	d by the organization during		
	the taxable year 🟲				
4	Number of states where property subject to conserva	ation easement is located ►			
5	Does the organization have a written policy regarding enforcement of the conservation easements it holds		ations, and Yes No		
6	Staff or volunteer hours devoted to monitoring, inspe	cting and enforcing easements during the	year ►		
7	A mount of expenses incurred in monitoring, inspecti	ng, and enforcing easements during the ye	ear ► \$		
8	Does each conservation easement reported on line 2 $170(h)(4)(B)(i)$ and $170(h)(4)(B)(ii)$?	2(d) above satisfy the requirements of sec	tion Yes No		
9	In Part XIV, describe how the organization reports c balance sheet, and include, if applicable, the text of the organization's accounting for conservation easer	the footnote to the organization's financial	·		
Par	Organizations Maintaining Collection Complete if the organization answered		or Other Similar Assets.		
1a	If the organization elected, as permitted under SFAS art, historical treasures, or other similar assets held provide, in Part XIV, the text of the footnote to its fir	for public exhibition, education or research	ch in furtherance of public service,		
b	If the organization elected, as permitted under SFAS historical treasures, or other similar assets held for provide the following amounts relating to these items	public exhibition, education, or research ii			
	(i) Revenues included in Form 990, Part VIII, line 1		> \$		
	(ii) Assets included in Form 990, Part X		► \$		
2	If the organization received or held works of art, hist following amounts required to be reported under SFA		or financial gain, provide the		
а	Revenues included in Form 990, Part VIII, line 1		► \$		
b	Assets included in Form 990. Part X				

Part IV, line 9, or reported an amount on Form 990, Part X, line 21. 1a Is the organization in agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? 1b If "Yes," explain why in Part XIV and complete the following table 1c	Par	Organizations Maintaining Co	llections of Art,	His	<u>tori</u>	<u>cal Treasu</u>	res, or Othe	<u>er Simila</u>	ar Asse	: ts (co	ontinued)
b Scholarly research c Other c Preservation for future generations 4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV 5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sole to raise funds rather than to be maintained as part of the organization's collection? Yes 2 Part XIV Trust, Escrew and Custodial Arrangements. Complete if the organization answered "Yes" to Form 99 Part IV, Jine 9, or reported an amount on Form 990, Part X, Jine 21. 1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X, Jine 21. 1b If "Yes," explain why in Part XIV and complete the following table C Beginning balance Ind Ind Ind Ind C Beginning balance Ind Ind Ind D Distributions during the year Ind Ind E Inding balance Ind Ind D If "Yes," explain the arrangement in Part XIV Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, Jine 10. 1a Beginning of year balance Ind Ind Ind C Other explainties arrangement in Part XIV Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, Jine 10. 1c India	3		r records, check any	of th	e foll	owing that ar	e a sıgnıfıcant ι	use of its o	ollection	1	
Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV During the year, did the organization's collections and explain how they further the organization's exempt purpose in Part XIV During the year, did the organization's collection? Ves John Mark State St	а	Public exhibition		d	Г	Loan or exc	hange programs	5			
4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV 5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Part IV Irrust, Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 99 Part IV, line 9, or reported an amount on Form 990, Part X, line 21. Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? If "Yes," explain why in Part XIV and complete the following table It It	ь	Scholarly research		e	Γ	Other					
Part XIV assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Part IV, line 9, or reported an amount on Form 990, Part X, line 21. 1a is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not include on Form 99, Part X, line 21. 1b if "Yes," explain why in Part XIV and complete the following table C Beginning balance C Beginning balance 1c	С	Preservation for future generations									
Time	4	•	ollections and explair	n hov	v the	y further the o	organization's e	xempt pur	pose in		
Part IV	5							nılar	Г	Yes	┌ No
Tyes Five	Pai	t IV Trust, Escrow and Custodial	Arrangements.	Com	plete	e if the orga		vered "Ye	es" to Fo	orm 9	90,
Additions during the year	1a		dian or other intermed	liary	for c	ontributions (or other assets	not	Г	Yes	┌ No
C	b	If "Yes," explain why in Part XIV and comple	ete the following table								
d Additions during the year Ending balance									A mou	ınt	
Test Distributions during the year Distributions during the year Distributions during the year Distributions during the year Distributions Distr											
This	d	Additions during the year									
Did the organization include an amount on Form 990, Part X, line 21? Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.	е	Distributions during the year									
b If "Yes," explain the arrangement in Part XIV Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10. (a) Current Year (b) Fror Year (c) Two Years Back (d) Three Years Back (e) Four Year 14.1,460 b Contributions c Investment earnings or losses 1,500 d Grants or scholarships 36,763 e Other expenditures for facilities and programs f Administrative expenses 406,197 2 Provide the estimated percentage of the year end balance held as a Board designated or quasi-endowment ▶ 100 000 % c Term endowment ▶ 100 000 % c Term endowment ▶ 100 000 % i i) unrelated organizations 3a(i) x 4 4 4 4 4 4 4 4 4	f	Ending balance					1f				
Part V Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10. (a)Current Year (b)Prior Years Back (d)Three Years Back (e)Four Years Back (d)Three Years Back (e)Four Years Back (d)Three Years Back (e)Four Years Pack (e)Four	2a	Did the organization include an amount on F	orm 990, Part X, line	21?					Г	Yes	┌ No
Countributions Coun	b										
table Beginning of year balance	Pa	rt V Endowment Funds. Complete									
b Contributions	_			(b)	Prior `	rear (c)Tw	o Years Back (d)	Three Years	Back (e)Four Y	ears Back
to display the content earnings or losses	_		441,400								
d Grants or scholarships			1 500								
e Other expenditures for facilities and programs		<u>-</u>									
and programs		·	36,763								
Provide the estimated percentage of the year end balance held as a Board designated or quasi-endowment ▶ b Permanent endowment ▶ 100 000 % Term endowment ▶ 200 000 % Term endowment ▶ 300 000 % Term endowment ▶ 340	е	·									
2 Provide the estimated percentage of the year end balance held as a Board designated or quasi-endowment ▶ b Permanent endowment ▶ 100 000 % c Term endowment ▶ 3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by (i) unrelated organizations	f	Administrative expenses									
b Permanent endowment ► 100 000 % c Term endowment ► 100 000 % A re there endowment funds not in the possession of the organization that are held and administered for the organization by (i) unrelated organizations	g	End of year balance	406,197								
to Term endowment ► 100 000 % Term endowment ► 100 000 % Are there endowment funds not in the possession of the organization that are held and administered for the organization by (i) unrelated organizations	2	Provide the estimated percentage of the yea	r end balance held as	5							
Term endowment ► Are there endowment funds not in the possession of the organization that are held and administered for the organization by (i) unrelated organizations	а	Board designated or quasi-endowment 🕨									
Are there endowment funds not in the possession of the organization that are held and administered for the organization by (i) unrelated organizations (ii) related organizations If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? Describe in Part XIV the intended uses of the organization's endowment funds Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10. Description of investment (a) Cost or other basis (investment) Description of investment (b) Cost or other basis (other) (c) Depreciation (d) Bool of the basis (investment) 1 Land	ь	Permanent endowment 🕨 100 000 %									
Are there endowment funds not in the possession of the organization that are held and administered for the organization by (i) unrelated organizations (ii) related organizations If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R? Describe in Part XIV the intended uses of the organization's endowment funds Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10. Description of investment (a) Cost or other basis (investment) Description of investment (b) Cost or other basis (other) (c) Depreciation (d) Bool of the basis (investment) 1 Land	с	Term endowment 🕨									
(i) unrelated organizations	3a		ssion of the organizat	ion t	thata	are held and a	dministered for	the			
(ii) related organizations		-								Yes	No
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?		(i) unrelated organizations			•					<u> </u>	No
Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10. Description of investment (a) Cost or other basis (investment) (b) Cost or other basis (other) (c) Depreciation (d) Bool (d) Bool (d) Buildings	_								_	<u> </u>	No
Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10. Description of investment (a) Cost or other basis (investment) (b) Cost or other basis (other) (c) Depreciation (d) Bool (d)			•						ЗЬ	<u></u>	No
Description of investment (a) Cost or other basis (investment) (b) Cost or other basis (other) (c) Depreciation (d) Book and a substitution of investment 1a Land 3,294,848							art V lung 10				
Description of investment basis (investment) basis (other) (c) Depreciation (d) Book 1a Land 3,294,848 3, b Buildings 370,000 305,250 c Leasehold improvements 1,640,171 406,550 1, d Equipment 1,382,445 652,470 652,470 e Other 1,040,171 1,382,445 652,470 1,040,171	Pal	investments—Land, Building	s, and Equipmen	τ. 5		•	·	T			
b Buildings 370,000 305,250 c Leasehold improvements 1,640,171 406,550 1, d Equipment 1,382,445 652,470 e Other 1,382,445 652,470 Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) 1,5		Description of investment						(c) Depre	eciation	(d) Bo	ook value
c Leasehold improvements 1,640,171 406,550 1, d Equipment 1,382,445 652,470 e Other 1,382,445 652,470 Fotal. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) 1,540,171 406,550 1,540,171 Fotal. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) 1,540,171 5,540,070	1a	Land				3,294,848		_			3,294,848
d Equipment 1,382,445 652,470 e Other 1,382,445 652,470 Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) 1,382,445 652,470	b	Buildings				370,000			305,250		64,750
e Other	c	Leasehold improvements					1,640,171		406,550		1,233,621
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).)	d	Equipment					1,382,445		652,470		729,975
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).)	e	Other									
			orm 990, Part X, columi	n (B)	, line	10(c).)					5,323,194
		. , , , ,		. ,				Sche	dule D (l		

Part VII Investments—Other Securities. See	Part VII Investments—Other Securities. See Form 990, Part X, line 12.				
(a) Description of security or cateory (including name of security)	(b)Book value		d of valuation year market value		
Financial derivatives and other financial products					
Closely-held equity interests			_		
Other					
Total. (Column (b) should equal Form 990, Part X, col (B) line 12)	20,979,756				
Part VIII Investments—Program Related. Se	e Form 990, Part X, line				
(a) Description of investment type	(b) Book value		d of valuation year market value		
		Cost of end-of-	year market value		
-					
Part IX Other Assets. See Form 990, Part X, col (B) line 13)	l				
(a) Descri			(b) Book value		
Total. (Column (b) should equal Form 990, Part X, col.(B) line	15.)				
Part X Other Liabilities. See Form 990, Part X	1				
(a) Description of Liability	(b) A mount				
Federal Income Taxes	604.000				
Accrued expensediscontinued operations	691,820				
Total. (Column (b) should equal Form 990, Part X, col (B) line 25) ▶	691,820				

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	-113,851
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	15,665,711
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	-15,779,562
4	Net unrealized gains (losses) on investments	4	-12,296,395
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	-36,763
9	Total adjustments (net) Add lines 4 - 8	9	-12,333,158
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10	-28,112,720
Par	t XII Reconciliation of Revenue per Audited Financial Statements With Revenue p	er R	eturn
1	Total revenue, gains, and other support per audited financial statements	1	-12,739,763
2	A mounts included on line 1 but not on Form 990, Part VIII, line 12		
а	Net unrealized gains on investments		
ь	Donated services and use of facilities		
c	Recoveries of prior year grants		
d	Other (Describe in Part XIV)		
e	Add lines 2a through 2d	2e	-11,970,897
3	Subtract line 2e from line 1	3	-768,866
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
а	Investment expenses not included on Form 990, Part VIII, line 7b . 4a 655,015		
b	Other (Describe in Part XIV) 4b		
c	Add lines 4a and 4b	4c	655,015
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	-113,851
Part	Reconciliation of Expenses per Audited Financial Statements With Expenses	s per	Return
1	Total expenses and losses per audited financial statements	1	15,336,194
2	A mounts included on line 1 but not on Form 990, Part IX, line 25		
а	Donated services and use of facilities		
b	Prior year adjustments		
c	Losses reported on Form 990, Part IX, line 25		
d	Other (Describe in Part XIV)		
е	Add lines 2a through 2d	2e	325,498
3	Subtract line 2e from line 1	3	15,010,696
4	A mounts included on Form 990, Part IX, line 25, but not on line 1:		
а	Investment expenses not included on Form 990, Part VIII, line 7b 4a 655,015		
b	Other (Describe in Part XIV) 4b		
c	Add lines 4a and 4b	4c	655,015
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	15,665,711

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part XIV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b

Ident if ier	Ret urn Reference	Explanation				
Part X	Part X FIN48 Footnote	In July 2006, the Financial Accounting Standards Board (FAS issued interpretation for Accounting for Uncertainty in Incom Taxes (FASB ASC 740-10), which provides guidance on how uncertain tax positions should be recognized, measured, presented and disclosed in the financial statements FASB AS 740-10 requires evaluation of tax positions taken in the cour of preparing The Health Trust's tax return to determine wheth tax positions are "more-likely-than-not" of having been sustained by the applicable tax authority Tax benefits of positions not deemed to meet the "more-likely-than-not" threshold would be recorded as tax expense in the current year The Health Trust believes that it has appropriate support for unrelated business taxable income (UBTI) position taken and as such, does not have any uncertain tax positions that impair The Health Trust's financial position or statements of activition and change in net assets				
Part XIII, Line 2d	Part XIII, Line 2d Other expenses and losses per audited F/S	Special event expense \$16411 Rental expense \$96169				
Part XII, Line 2d	Part XII, Line 2d Other revenue amounts included in F/S but not included on form 990	Special event expense \$16411 Rental expense \$96169				
Part XI, Line 8	Part XI, Line 8 Other Changes in Net Assets or Fund Balances	Change in premanently restricted \$ -36763				
Part V , Line 4	Part V , Line 4 Intended uses of the endowment fund	Permanently restricted net assets consist of endowment fund investments to be held indefinitely, the income from which is used to support various programs. During the year ended June 30, 2009, according to directions from the original donor, The Health Trust released \$36,763 from permanently restricted net assets and contributed that amount to another nonprofit organization.				

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DLN: 93493117008040

OMB No 1545-0047

2008

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SCHEDULE G (Form 990 or 990-EZ)

Supplemental Information Regarding Fundraising or Gaming Activities

Department of the Treasury
Internal Revenue Service

Attach to Form 990 or Form 990-EZ. Must be completed by organizations that answer "Yes" to Form 990, Part IV,
lines 17, 18, or 19, and by organizations that enter more than \$15,000 on Form 990-EZ, line 6a.

Open to Public Inspection

ROMAI FROVOINGO CONTICO						Inspection	
lame of the organization					Employer ider	tification number	
he Health Trust					94-6050231		
		C.11		1 112 / 11 /			
Part I Fundraising Act	ivities. Complet	e if the or	rganizat	ion answered "Yes" t	o Form 990, Part IV	, line 17.	
Indicate whether the organ	ization raised funds	through ar	ny of the	following activities Che	ck all that apply		
a Mail solicitations				e Solicitation of r	on-government grants		
b Email solicitations				f	jovernment grants		
c Phone solicitations				g Special fundrais	sing events		
d In-person solicitations							
Did the organization have a or key employees listed inIf "Yes," list the ten highes to be compensated at least	Form 990, Part VII t paid individuals or) or entity r entities (f	in connec	ction with professional f rs) pursuant to agreeme	undraising activities? ents under which the fur		
(i) Name of individual or entity (fundraiser)	I (III) A CTIVITY	(iii) Did fundraiser have custody or control of		(iv) Gross receipts	(v) A mount paid to (or retained by) fundraiser listed in	(vi) A mount paid to (or retained by)	
or energy (randraiser)		contribu		Hom activity	col (i)	organization	
		Yes	No	1	(.,		
	I	1	I	I	I	1	
otal	l		.				

3 List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing

			(a) Event #1	(b) Event #2	(c) O ther Events	(d) To (Add col	tal Eve	
			Golf Tourney	Dine for Life			(a)tn (c))	rougr
			(event type)	(event type)	(total number)			
ikue	1	Gross receipts	38,150	27,955			6	6,105
Revenue	2	Less Charitable contributions	22,589	10,968			3	3,557
	3	Gross revenue (line 1 minus line 2)	15,561	16,987			3.	2,548
	4	Cash Prizes						
Ses	5	Non-cash Prizes						
cper	6	Rent/Facility costs						
Direct Expenses	7	Other direct expenses	16,411	16,987				3,398
	8	Direct expense summary Add line	es 4 through 7 ın column	(d)			3	3,398
	9	Net income summary Combine lii	nes 3 and 8 in column (d)					-850
ar	t III	Gaming. Complete if the or \$15,000 on Form 990-EZ, lir		'Yes" to Form 990, Pa	rt IV, line 19, or repo	rted mor	e thar	1
Revenue			(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) O ther gaming	(d) Total col (a) th	gamıng rough co	(Add I (c))
č	1	Gross revenue						
— မှ	2	Cash prizes						
Direct Expenses	3	Non-cash prizes						
ភ ច	4	Rent/facility costs						
<u>@</u>	5	Other direct expenses						
	6	Volunteer labor	┌ Yes	┌ Yes	┌ Yes			
	7	Direct expense summary Add line	'	,				
	8	Net gaming income summary Com	hine lines 1 and 7 in colu	mn (d)				
		Wet gaming income summary Com	bille lilles I alla / lil cola	mm (d)			Yes	No
9		er the state(s) in which the organiza						
а		he organization licensed to operate	gaming activities in each	of these states?		· 9a		
Ь		No," Explain						
•	10/							
.0a b		e any ofthe organization's gaming l Yes," Explain	icenses revokea, suspen	ded or terminated during	the tax year?	10a		

			
13	Indicate the percentage of gaming activity operated in		
а	The organization's facility		
b	An outside facility		
14	Provide the name and address of the person who prepares the organization's gaming/special events books and records		
	Name •		
	Address •		
15a	Does the organization have a contract with a third party from whom the organization receives gaming revenue?	15a	
Ь	If "Yes," enter the amount of gaming revenue received by the organization > \$ and the amount of gaming revenue retained by the third party > \$		
c	If "Yes," enter name and address		
	Name •		
	Address 🟲		
16	Gaming manager information		
	Name 🟲		
	Gaming manager compensation 🕨 \$		
	Description of services provided 🟲		
	Director/officer Employee Independent contractor		
17	Mandatory distributions		
а	Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?	17a	
b	Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year 📂 💲		

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DLN: 93493117008040

OMB No 1545-0047

Department of the Treasury Internal Revenue Service

Schedule I

(Form 990)

Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22. Attach to Form 990.

Grants and Other Assistance to Organizations,

Governments and Individuals in the U.S.

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Name of the organization						Employer identi	fication number
The Health Trust						94-6050231	
Part I General Inform	mation on Gran	nts and Assistance				1	
Does the organization ma the selection criteria use Describe in Part IV the o	d to award the grar	nts or assistance?					▽ Yes ┌
Form 990, Part I Part IV and Sch	IV, line 21 for an edule I-1 if addit	ny recipient that rece tional space is	eived more than \$5,00	00. Check this box in	es. Complete if the of no one recipient rec	eived more than \$5,	
1(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) A mount of cash grant	(e) A mount of non- cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Schedule O			2,888,457	0			Charitable programs & support
2 Enter total number of sec			ı				105
organizations						<u></u> . .	> 3
For Paperwork Reduction Act Not	ice, see the Instruct	ions for Form 990.	<u> </u>	Cat No 50055P		Sc	hedule I (Form 990) 2008

Part III	Grants and Other Assistance to Individuals in the United S	ates. Complete if the organization answered "Yes" on Form 990	, Part IV, line 22.
	Use Schedule I-1 (Form 990) if additional space is needed.		

(a)Type of grant or assistance	(b) Number of recipients	(c)A mount of cash grant	(d)A mount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f)Description of non-cash assistance

Part IV Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information. See Additional Data Table

Ident if ier	Return Reference	Explanation
Grantmaker's Description of How Grants are Used		Once grant contracts are signed by all parties and grants payments are issued, the grantee provides The Health Trust with - Interim narrative report and budget of funds spent to-date at the mid-point of the grant period-Final narrative report and budget of funds spent during the grant periodPer the contract, the final report shall indicate the objectives of the Grant as outlined in the Proposal, the outputs and outcomes achieved, and any problems or obstacles encountered in the effort to achieve the Grant purposes. The financial report shall be prepared in accordance with regular accounting standards consistently applied for all periods during which Grant funds are received and shall show actual expenditures against the approved line item budget. Such reports shall be retained in the Grantee's files for a period of not less than four (4) years after expiration of the Grant period Expenditures of the Grant funds must adhere to the specific line items in the budget included in the Proposal. Transfers among line items (increases and decreases) are permitted if they do not in the aggregate exceed 10% of any line item. Budget variances in excess of 10% of any line item require prior written Trust and shall not, in the aggregate, result in an increase to the total budget for the Grant. If any of the Grant funds have not been expended during the budget period of the Grant, the unspent funds shall be promptly returned to the Trust within thirty days of the expiration of that period unless otherwise agreed in writing by the Trust. The Grantee shall identify and account for the Grant separately on its general ledger. A systematic record shall be kept by the Grantee of the receipt and disbursement of funds and expenditures incurred under the terms of the Grant, and substantiating documents such as bills, invoices, canceled checks, and receipts, shall be retained in the Grantee's files for a period of not less than four (4) years after expiration of the Grant period. In FY09, all of The Health Trust grants went to 501(C)3

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DLN: 93493117008040

OMB No 1545-0047

Schedule J (Form 990)

Department of the Treasury

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest **Compensated Employees**

► Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

2008

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Internal Revenue Service	that answered "Yes" to Form 990, Part IV, line 23.	Inspe	ectio	1
Name of the organ The Health Trust	ization Employer identif	ication nur	nber	
Part I Quest	ions Regarding Compensation			
			Yes	Νo
1a Check the app	ropiate box(es) if the organization provided any of the following to or for a person listed in Form			

1a	Check the appropriate box(es) if the organization pro 990, Part VII, Section A, line 1a Complete Part II					
	First class or charter travel	\vdash	Housing allowance or residence for personal use			
	Travel for companions		Payments for business use of personal residence			
	Tax idemnification and gross-up payments	Г	Health or social club dues or initiation fees			
	Discretionary spending account	Γ	Personal services (e g , maid, chauffeur, chef)			
b	If line 1a is checked, did the organization follow a w provision of all the expenses described above? If "N			1b		
2	Did the organization require substantiation prior to officers, directors, trustees, and the CEO/Executive			2		
3	Indicate which, if any, of the following the organizationg organization's CEO/Executive Director Check all t		•			
	Compensation committee		Written employment contract			
	✓ Independent compensation consultant	<u> </u>				
	Form 990 of other organizations	₹	Approval by the board or compensation committee			
4	During the year, did any person listed in Form 990,	Part V I	I, Section A, line 1a			
а	Receive a severance payment or change of control	paymen	t?	4a	Yes	
b	Participate in, or receive payment from, a suppleme	ntal nor	nqualified retirement plan?	4b		No
c	Participate in, or receive payment from, an equity-b	ased co	ompensation arrangement?	4c		Νo
	If "Yes" to any of lines 4a-c, list the persons and pi	rovide tl	he applicable amounts for each item in Part III			
	501(c)(3) and 501(c)(4) organizations only must co	mplete	lines 5-8.			
5	For persons listed in form 990, Part VII, Section A, compensation contingent on the revenues of	line 1a	, did the organization pay or accrue any			
а	The organization?			5a		Νo
b	Any related organization?			5b		Νo
	If "Yes," to line 5a or 5b, describe in Part III					
6	For persons listed in form 990, Part VII, Section A, compensation contingent on the net earnings of	line 1a	, did the organization pay or accrue any			
а	The organization?			6a		Νo
b	Any related organization?			6b		Νo
	If "Yes," to line 6a or 6b, describe in Part III					
7	For persons listed in form 990, Part VII, Section A, payments not described in lines 5 and 6? If "Yes,"			7		No
8	Were any amounts reported in Form 990, Part VII, subject to the initial contract exception described in Part III	•	•	8		No

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(1)-(111) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

(A) Name		(B) Breakdown of	W-2 and/or 1099-MIS	SC compensation	(C) Deferred	(D) Nontaxable	(E) Total of columns	(F) Compensation
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other compensation	compensation	benefits	(B)(ı)-(D)	reported in prior Form 990 or Form 990-EZ
Todd Hansen	(ı) (ıı)	199,354		6,500	15,500	30,935	252,289	
Ira Holtzman	(1) (11)	172,649	5,500	6,500	15,500	15,509	215,658	
Gary Allen	(ı) (ıı)			97,850			97,850	
Frederick Ferrer	(ı) (ıı)	242,117			15,500	9,355	266,972	
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							
	(i)							
	(ii)							

Part III Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8 Also complete this part for any additional information

Ident if ier	Return Reference	Explanation
-		
	·	

OMB No 1545-0047

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SCHEDULE M **Non-Cash Contributions** (Form 990)

Department of the Treasury Internal Revenue Service

To be completed by organizations that answered "Yes" on Form 990, Part IV, lines 29 or 30. Attach to Form 990

Name of the organization The Health Trust

Employer identification number

94-6050231

Pa	Types of Property							
		(a) Check ıf	(b) Number of Contributions	(c) Revenues reported on Form 990, Part VIII, line	(d Method of d reven	- etermı	nıng	
		applicable		1 g				
1	Art—Works of art							
2	Art—Historical treasures .							
3	Art—Fractional interests							
4	Books and publications							
5	Clothing and household goods	Х		15,715				
6	Cars and other vehicles							
7	Boats and planes							
8	Intellectual property							
9	Securities—Publicly traded .							
10	Securities—Closely held stock $$.							
11	Securities—Partnership, LLC, or trust interests							
12	Securities—Miscellaneous							
13	Qualified conservation contribution (historic structures)							
14	Qualified conservation contribution (other)							
15	Real estate—Residential .							
16	Real estate—Commercial							
17	Real estate—Other							
18	Collectibles							
19	Food inventory	Х	1	168,904				
20	Drugs and medical supplies .							
21	Taxidermy							
22	Historical artifacts							
23	Scientific specimens							
24	Archeological artifacts							
25	Other (describe)							
26	Other (describe)							
27	Other (describe)							
28	Other (describe)							
29	Number of Forms 8283 received which the organization complete Acknowledgement	d Form 828		ar for contributions for	29			
							Yes	No
30a	During the year, did the organization hold for at	tion receiv	e by contribution any prope	rty reported in Part I, lines	1-28 that it must			
	least three years from the date o	of the initial	contribution, and which is	not required to be used for ϵ	exempt purposes			
	for the entire holding period? .					30a		No
	If "Yes", describe the arrangeme							
31	Does the organization have a gif	t acceptano	ce policy that requires the i	review of any non-standard	contributions?	31	Yes	
32a	Does the organization hire or use contributions?	e third parti	es or related organizations	to solicit, process, or sell r	non-cash	32a		Νο
b 33	If "Yes", describe in Part II If the organization did not report checked, describe in Part II	revenues i	n Column (c) for a type of p	roperty for which Column (a	a) is			
	,							

Supplemental Information. Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.		
Identifier	ReturnReference	Explanation
240111111	Notal III Colored	Explanation
	1	1

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Supplemental Information to Form 990

OMB No 1545-0047

DLN: 93493117008040

Inspection

Attach to Form 990. To be completed by organizations to provide additional information for Department of the Treasury responses to specific questions for the Form 990 or to provide any additional information. Internal Revenue Service Name of the organization

SCHEDULE O

Grant Detail

- Summary

Return

Reference

Grant Detail

- Good

Grants

Samarıtan

Return

Reference

Grant Detail

Samarıtan

- Good

Grants

Identifier

Identifier

(Form 990)

Employer identification number

	51	94-6050231
Identifier	Return Reference	Explanation
		El Camino Hospital Foundation/Mountain View RotaCare Free Clinic/Chronic Illness Case Management Program-\$60,000 (provided in conjunction with El Camino Hospital) To provide intensive, individualized care and case management for low-income, uninsured patients, aged 18 and older who have chronic illnesses to assist them i managing their diseases Evergreen Community College Foundation/Evergreen Nursing Scholarships-\$51,000To provide scholarships to ethnically diverse nursing students to enable them to complete their RN degree at Everg and their BS in Nursing at San Jose State with the goal of broadening the pool of nurses in Santa Clara County to provide culturally appropriate health care to underserved populations Family Supportive Housing/Healthy Familie Program-\$50,000 To provide homeless families with the resources and support to gain access to healthcare an make healthy lifestyle choices. Indian Health Center/Diabetes Prevention Program-\$127,000 (over two years) To

1	Grant Detail- Healthy Communities Grants	managing their diseases Evergreen Community College Foundation/Evergreen Nursing Scholarships-\$51,000To provide scholarships to ethnically diverse nursing students to enable them to complete their RN degree at Evergreen and their BS in Nursing at San Jose State with the goal of broadening the pool of nurses in Santa Clara County to provide culturally appropriate health care to underserved populations Family Supportive Housing/Healthy Families Program-\$50,000 To provide homeless families with the resources and support to gain access to healthcare and to make healthy lifestyle choices Indian Health Center/Diabetes Prevention Program-\$127,000 (over two years) To adapt and expand the Diabetes Prevention Program to other underserved ethnic populations who are at-risk for developing diabetes InnVision-Healthcare for the Homeless Program-\$51,000 To expand the health service programs by integrating nutrition, health and wellness activities and education throughout the organization to include staff as well as clients Islamc Networks Group/Cultural Competency in Healthcare-The Muslim Patient-\$31,060To improve the cultural competency of healthcare practitioners and organizations related to the care of Muslim patients and to improve access to, and appropriate utilization of, primary and preventive healthcare for the Muslim population Santa Clara County Department of Public Health-Health Data Project-\$86,000 To develop a Health Equity Report to further Santa Clara County's ability to address social determinants of health. The report will include a comprehensive assessment of factors, including housing, transportation schools and hospitals, which collectively influence health outcomes. Santa Clara Family Health Foundation (SCFHF)/Healthy Kids-\$500,000 To provide comprehensive health coverage to approximately 500 children each month through the Healthy Kids Program and conduct appropriate, targeted community outreach to disseminate information to Healthy Kids Program and conduct appropriate, targeted community outreach to dis
ldentifier	Return Reference	Explanation

by or through a nonprofit or public hospital. These grants may be multi-year and may be awarded in any amount

Good Samaritan Grants are awarded to community-based organizations and public and nonprofit health providers

twice a year. These grants are intended to supply short-term funding and may be requested for any amount up to \$50,000 Restricted grants are made after consulting with the donor and address local community health needs Total grants awarded during the FYE 6/30/09 (\$3,254,957) exceeded grant expense reflected in the financial

Explanation

Anzar High School (Aromas San Juan Unified School District)/Healthy Lunches Program-\$24,695 To improve the school lunch program through a pilot project with the Advanced Culinary Arts class and Food Services which will plan and prepare a once-a-w eek healthy lunch featuring fresh produce from local growers and the school's organic

Community Services/Active Start Sunnyvale-\$25,805To implement a program to increase physical activity among sedentary seniors and increase the number of trained instructors of physical activity for older individuals Health Research for Action/UC Berkeley-Healthy Steps for Older Adults-\$199,921To adapt and develop English and

statements and Form 990 (\$2,888,457) as a result of adjustments associated with prior year grants

	Grant Detail Healthy Living Grants	garden City of Mountain View /Mountain View 2030 General Plan and Health Planning-\$61,880To provide technical expertises of that health-related policies can be integrated into all elements of the General Plan including land use, urban design, housing and circulation Greenbelt Alliance/Planning for Healthy Communities-\$76,000 To support research and advocacy to promote planning and zoning policies in San Jose, Santa Clara, and Mountain View's General Plans that support increased access to physical activity and nutritious food and healthy lifestyles. Palo Alto Medical Foundation/Youth Health Risk Assessment-\$39,600 To complete and test an on-line health assessment and coaching tool for use by both youth and youth-serving organizations to help youth develop wellness habits by increasing their awareness about nutrition, physical activity and other health-related issues. Sacred Heart Community Services/La Mesa Verde Home Garden Program-\$51,000 To implement 100 home gardens for very low-income Latino residents in the Washington "Strong Neighborhoods Initiative" area of San Jose to increase residents' access to and consumption of fresh, organic, healthy produce and increase their physical activity through working in their gardens. The Tech Museum/Project Stay Healthy-\$100,000 To create an exhibit area called Project Stay Healthy within the LifeTech Gallery which will use technological tools to help people of all ages to learn about the beneficial impacts of good nutrition and physical activity and how to modify their behavior to improve their health Valley Medical Center Foundation/Phase II Childhood Feeding Collaborative-\$85,000To further implement an early-intervention project designed to decrease the risk of overweight and diabetes by training physicians and other health providers in Santa Clara County to identify high-risk, low-income children (age 2 to 5 years) and connecting parents to community resources during well-child exams. YMCA of Silicon Valley/Healthy Silicon Valley Collaborative-\$134,284 To provide tra
ldentifier	Return Reference	Explanation
		HEALTH PARTNERSHIP GRANTS - Healthy Aging Grants (Unless otherwise noted, the following grants were made in conjunction with Santa Clara Valley Health and Hospital System and Valley Medical Center Foundation, its fund development entity) Asian Americans for Community Involvement-Healthy Aging for Asian Americans-\$100,000To provide primary and preventive services to low-income Asian American seniors to improve their access to linguistically and culturally competent health care and physical activity opportunities City of Sunnyvale Department of

	Grant Detail - Healthy Aging Grants	Spanish versions of its award-winning physical activity guide for use in promoting physical activity among adults aged 50 and over. The guide addresses the informational needs identified as a priority in "Community for a Lifetime," Santa Clara County's ten-year strategic plan on aging. Hispanic Foundation Silicon Valley/Grantmaking Partnership to Invest in a Healthy Latino Community-\$26,000 To provide grant support for organizations offering culturally-competent services to Hispanic elders or their caregivers in Santa Clara County, raise the level of community awareness about Healthy Aging and educate caregivers about resources available to them. Metropolitan Adult Education Program/Better Bones and Balance Fitness Program-\$16,000 To expand an evidenced-based fitness program that utilizes strength building and weight-bearing exercises to arrest bone loss and decrease the risk for falls and subsequent fracture in older adults Respite & Research for Alzheimer's Disease/Alzheimer's Activity Center-Caregiver Wellness Program-\$51,000 To address the unique health and wellness needs of Alzheimer's caregivers age 50 and over by providing caregiving training, support groups and caregiver care plans that incorporate healthy nutrition, exercise and tools for stress management. San Jose State University/Physical Activity Technical Assistance for Healthy Aging Program Development-\$28,474. To provide technical assistance to organizations that serve older adults to build their capacity to provide evidence-based physical activity programming. South Bay Vestibular Support Group/A Matter of Balance-Volunteer Lay Leader-\$15,739To implement an evidence-based fall prevention intervention designed to diminish the risk and occurrence of falling for San Jose residents over the age of 60 w ho experience imbalance or dizziness related to vestibular dysfunction. World Cardio Tai Chi Association/Wellness Tai Chi for Elders-\$12,390 To partner with three senior-serving, community-based organizations to provide the risk of falls.
		parameter and reducer the New Or Talle
Identifier	Return Reference	Explanation

sponsorship of the Community Garden Opening Celebration on August 14, 2009 to promote urban/sustainable

agriculture and improve access to fresh produce and physical activity Sustainable Community Gardens/Full Circle

low-income, underserved students, their families and teachers within the Santa Clara Unified School District and

members of the Peterson Middle School neighborhood International Association for Human Values-\$500 For sponsorship of the 2009 Yogathon on 5/30/09 to promote physical activity and benefit the Youth Empowerment Seminar Rotary Club of Los Gatos-\$2,500 For sponsorship of the Thomas Ryan School Fit Fair on June 6, 2009 to support the Fit Families program to promote health and wellness among youth and families San Benito High School District-\$2,500 For sponsorship of the Office of Special Education Baler Gifted Games to enable developmentally and physically disabled students, grades K-12, to participate in athletic competition on May 15, 2009 at San Benito High School SJ/SV Chamber of Commerce-\$5,000 For sponsorship of the 2008 GoWell Summit on November 14, 2008 to benefit Silicon Valley community members and leaders SJB Child Development Centers-\$3,000 To support the SJB Fitness Fair on April 18, 2009 to benefit low-income, minority communities in East San Jose School Health Clinics of Santa Clara County-\$4,000 For sponsorship of the Salsa, Salud y Mas community event on June 20, 2009 to benefit School Health Clinics of Santa Clara County Somos Mayfair-\$5,000 To support program impact evaluation for Somos Mayfair Veggielution/Urban Farming Project-\$25,000 To support increased staff capacity to manage and expand an urban farm that benefits high school students and low-income residents in Santa Clara County Via Services-Grow Smart Project-\$31,183 To develop and implement a nutrition and physical activity curriculum to increase knowledge about nutrition and physical activity among residents of group homes and their caregivers to encourage healthier

Farm-\$50,000 To expand activities to provide increased, affordable access to local, sustainably produced food for

Explanation

Good Samarıtan Grants - Healthy Living Grants (continued)The Health Trust High School Mini Grants and

\$5,000Breast Cancer Connections-\$1,000 For sponsorship of the 2009 Breakfast Speaker Event on April 21, 2009 to support the organization's programs and services City of San Jose-\$5,000 For sponsorship of the 2009 CommUnity Resource Fair at History Park in San Jose on Sunday, June 14, 2009, to show case vital community resources

offered to Santa Clara County residents Community Health Forum (Office of Senator Elaine K Alquist)-\$4,900 To

aw areness about good health, fitness and nutrition Community Health Partnership/Aw ards Breakfast-\$250 For

sponsorship of the 9th Annual Leadership & Awards Breakfast to raise awareness of community health centers in Santa Clara County Community Health Partnership-\$500 For sponsorship of the 10th Annual Leadership & Awards Breakfast to raise aw areness of community health centers in Santa Clara County Congregation Shir Hadash-\$5,000 For sponsorship of the annual Healthy Living Fair on April 19, 2009 targeting low-income, multi-ethnic and medicallyunderserved adults and children in Santa Clara County Eating Disorders Resource Center-Up to \$25,000 in matching

support the annual Community Health Forum on October 17, 2009 to address Family Wellness and promote

funds To increase aw areness of eating disorders among pediatricians and health care providers treating adolescents by providing members of its Speakers Bureau to train health care professionals and community members on early detection and intervention of eating disorders. Grantmakers in Health-\$14,990 For the 2008 and 2009 Funding Partner contribution and the 2009 annual meeting Hispanic Foundation Silicon Valley-\$1,500 For sponsorship of the 19th Annual Hispanic Charity Ball to raise awareness about issues affecting the Latino community and to assist in raising funds for nonprofit organizations serving the Hispanic community Hispanic Foundation of Silicon Valley-\$2,500 For sponsorship of the 20th Annual Hispanic Charity Ball to raise awareness about issues affecting the Latino community and to assist in raising funds for nonprofit organizations serving the Hispanic community Hospital Council of Northern & Central California-\$10,000 To support the 2010 Santa Clara County Needs Assessment to address health services in Santa Clara County JM Watt Consulting (in conjunction with Arete Consulting)-\$7,500 For production of the "Access to Health Care in Santa Clara County" Current Status and

Grant Detail - Good Samaritan Grants			Aw ards-\$9,370 To address the local and national epidemic of childhood obesity through in-school and extracurricular strategies that actively engage teens in healthy behaviors, health promotion, community service and advocacy
ldentifier	Return Reference		Explanation
		gala to Valley Santa on Ma of Ind wellno 17, 20 14, 20 Hill Hig 2009 Care i	Samaritan Grants - Healthy Communities GrantsAcademy of Friends-\$6,000 For sponsorship of the annual of support AIDS services held on February 22, 2009 AIDS Coalition Silicon Valley-\$5,000 To support the Silicon of Youth Leadership Summit on April 10, 2009 for individuals promoting HIV/AIDS prevention and services in Clara County AIDS Coalition Silicon Valley-\$1,000 For sponsorship of the annual Unmask the Mysteries Event by 29, 2009 to promote HIV/AIDS prevention and services in Santa Clara County American Assn. of Physicians and Origin (AAPIO)-\$1,000 For sponsorship of the AAPIO Health Fair on October 18, 2008 to promote health and eass American GI Forum-\$2,000 For sponsorship of the Binational Health Week closing ceremony on October 2008 that promotes health and wellness American Red Cross-\$500 To support the CPR Saturday event on March 2009 that provided free training to 140 youth in cardiopulmonary resuscitation and choking intervention Andrew 21, Arete Consulting (in conjunction with J M Watt Consulting)-\$10,000 For production of the "Access to Health 21, Arete Consulting (in conjunction with J M Watt Consulting)-\$10,000 For production of the "Access to Health 21, and Clara County Current Status and Future Risks" report released by The Health Trust Asian Americans 21, and wellness among Asian Americans in Santa Clara County Bay Area Coalition Against Proposition 1D-

Identifier	Return Reference	Explanation
	Grant Detail - Good Samaritan Grants	Good Samaritan Grants - Healthy Communities Grants (Continued)Santa Clara County Parks & Recreation Department-\$2,500 For sponsorship of the 2009 Festival in the Park event, "Where Wellness Meets Fun" on June 20 2009 to encourage Santa Clara County residents to practice healthy lifestyle behaviors and increase physical activity Santa Clara Family Health Foundation-\$1,000 For sponsorship of the retirement event for Leona Butler on March 28, 2009 to benefit the Healthy Kids Program in Santa Clara County Silicon Valley Council of Nonprofits-\$5,000 For sponsorship of the "Be Our Guest" Celebrity Server Luncheon on October 30, 2008 to benefit nonprofit organizations in Silicon Valley Silicon Valley Education Foundation-\$500 For sponsorship of the 4th Annual Healthy Children's Day hosted by Assembly Member Joe Coto to promote health and wellness among children Teatro Vision-\$1,000 For sponsorship of the 25th Anniversary Gala on May 30, 2009 to benefit community services in San Jose Theatre Q-\$1,000 To support of the production of "Lips Together, Teeth Apart" on June 12, 2009 to honor THT AIDS Services volunteers and donors Valley Medical Center Foundation/Santa Clara Valley Health & Hospital System-\$3,000To support the first Chronic Care Symposium to benefit Santa Clara Valley Health & Hospital System-\$3,000To support the first Chronic Care Symposium to benefit Santa Clara County residents on May 12, 2009 Vision & Compromiso-\$2,500 To support the Regional Promotora/Community Health Worker Netw ork Conference on September 13, 2008 VMC/PACE Clinic-Stanford University School of Medicine-Stanford/Santa Clara Methamphetamine Task Force-\$25,000 To support the campaign to reduce methamphetamine use in Santa Clara County and ultimately reduce the number of new HIV infections and the co-morbidity associated with methamphetamine use in those who are HIV positive. The Wellness Community Silicon Valley-\$1,500 For sponsorship of the 2008 Star Caregiver Awards on November 12, 2008 to raise funds for the organization's programs and
ldentifier	Return Reference	Explanation
		Good Samaritan Grants - Healthy Communities Grants (Continued) Joint Venture Silicon Valley-\$1,500 For sponsorship of the 2009 State of the Valley Conference on February 20, 2009 Junior League of San Jose-\$240 For sponsorship of the annual Volunteer Recognition Luncheon on April 24, 2009 to honor community volunteers and to promote volunteerism in Santa Clara County Kids in Common-\$5,000 For sponsorship of the Santa Clara County Children's Summit Event on Feb 3, 2009 to support the work of the Santa Clara County Children's Agenda and focus

		County and ultimately reduce the number of new HIV infections and the co-morbidity associated with methamphetamine use in those who are HIV positive. The Wellness Community Silicon Valley-\$1,500 For sponsorship of the 2008 Star Caregiver Awards on November 12, 2008 to raise funds for the organization's programs and services YWCA of Silicon Valley-\$2,000 For sponsorship of YWCA's annual luncheon on October 29, 2009
ldentifier	Return Reference	Explanation
	Grant Detail - Good Samaritan Grants	Good Samaritan Grants - Healthy Communities Grants (Continued) Joint Venture Silicon Valley-\$1,500 For sponsorship of the 2009 State of the Valley Conference on February 20, 2009 Junior League of San Jose-\$240 For sponsorship of the annual Volunteer Recognition Luncheon on April 24, 2009 to honor community volunteers and to promote volunteerism in Santa Clara County Kids in Common-\$5,000 For sponsorship of the Santa Clara County Children's Summit Event on Feb 3, 2009 to support the work of the Santa Clara County Children's Agenda and focus on measurable change Latinas Contra Cancer-\$3,000 For sponsorship of the 6th Annual Mother's Day Walk Against Cancer on May 10, 2009 to raise funds and awareness about the high incidence of childhood leukema in the Latino community Leadership Gilroy-\$550 For sponsorship of the 2009 Health and Social Service Day on July 17, 2009 to educate participants about the health and social services conditions in Gilroy Lupus on June 7, 2009 to support the California-\$1,000 For sponsorship of the 15th Annual 5k Run and Walk for Lupus on June 7, 2009 to support the patient education programs and services and to raise public awareness about the illness Mexican American Community Services Agency-\$5,000 For sponsorship of MACSA 45th Anniversary Event on June 27, 2009 to benefit MACSA's community services and activities May institute-\$2,500 For sponsorship of the MACSA's community activities May institute-\$2,500 For sponsorship of the Sarts Annual Forum on Positive Behavior Support at First 5 Santa Clara on March 31, 2009 to provide training and tools to teachers in California Metropolitian Community Church-\$250 For sponsorship of the annual World AIDS Day event on December 1, 2008 to raise awareness about the disease Momentum for Mental Health-\$1,000 For sponsorship of the 12th Annual Shining Stars Rising Above Stigma Benefit on May 8, 2009 to support mental health services in Santa Clara County People Acting in Community Together (PACT)-Local Solutions to Unnatural Causes to Health Disparti

ldentifier	Return Reference	Explanation
	Grant Detail - Good Samaritan Grants	Good Samaritan Grants - Health Aging Grants Community Services Agency/Hospital to Home Transition Management Project-\$25,000To pilot the Hospital To Home Transition Management Program (H2H) in an effort to reduce the number of re-hospitalizations of seniors with chronic disease and to enable seniors to live independently in their homes and avoid premature institutionalization. Foundation for Osteoporosis Research and Education-\$900 To support the Put the Brakes on Fractures Awareness Project on May 9, 2009 at the PlaneTree Library.

ldentifier	Return Reference	Explanation
Form 990, Part VI, Line 19	Form 990, Part VI, Line 19 Other Organization Documents Publicly Available	The governing documents and conflict of interest policy are available for inspection upon request. Audited financial statements are posted on The Health Trust's wiebsite.

Identifier	Return Reference	Explanation
Form 990, Part VI, Line 15b	Form 990, Part VI, Line 15b Compensation Review and Approval Process for Officers and Key Employees	The compensation of the CEO, COO and CFO is reviewed by the compensation committee of the board. Members of the compensation committee are independent with respect to the CEO, COO and CFO. The Health Trust engages an outside compensation consultant to arrive at reasonable compensation. The outside consultant reviews comparability data from compensation studies and other sources in arriving at a range of reasonable compensation. The compensation committee reviews the report and data provided by the outside consultant and documents its compensation decisions on a contemporaneous basis. The board of directors reviews and approves the decisions of the compensation committee.

ldentifier	Return Reference	Explanation
	Form 990, Part VI, Line 12c Explanation of Monitoring and Enforcement of Conflicts	A copy of the conflict of interest policy is reviewed and executed by each director and officer upon appointment or election, and then annually thereafter. By executing the policy the individual acknowledes the policy and agrees to comply with it. The executed acknowledgements are retained in the principal office of the Corporation.

Identifier Return Reference		Explanation					
Form 990, Part VI,	Form 990, Part VI, Line 10	The Form 990 is reviewed by the Chief Financial Officer and by the Audit Commitee of the					
Line 10	Form 990 Review Process	board of directors. A copy of the Form 990 is provided to the full board prior to filing					

OTHER PROGRAM SERVICES 4 [Continued from section 4a]Family Supportive Housing, in conjunction with SCVIHIS, was awarded \$50,000 for its Healthy Families Program, which provides homeless families with the necessary resources and support to gain full access to healthcare and to make healthy life active that promote wellness and prevent chronic diseases. The Indian Health Center, in conjunction with SCVIHIS, was awarded \$127,000 to implement a Diabetes Prevention Program for low-income individuals who are att-risk for developing this chronic disease. The curriculum emphasizes the patient's role in preventing diabetes in the AIDS Services area, 755 unduplicated individuals received services, including Social Work Case Management Services (153 clients), Level 1 Case Menagement (See Clients), Irong Gase Management (90 clients), Transportation Assistance (300 clients), Food Support (506 clients), Homesing Case Management (90 clients), Transportation Assistance (300 clients), Food Support (506 clients), Homesing Case Management (90 clients), Transportation Assistance (300 clients), Food Support (506 clients), Homesing Case Management (90 clients), Transportation Assistance (300 clients), Food Support (506 clients), Homesing Case Management (500 clients), Transportation Assistance (300 clients), and Emergency Funds (259 clients) Over 5 100 visits were made to The Livring Center, a support center for people living with HIV/AIDS Key outcomes of AIDS Services included HIV medication adherence (56 196 of all case management clients), and timesing and improved nutrition. The Chronic Disease Self-Management (CDSM), classes were held throughout 2009, and during FV2009 471 undiplicated individuals participated in the classes, consisting of six weekly group sessions. Key CDSM outcomes under evaluation include an increase in behaviors that help manage disease such as physical activity and healthy evaluation in conjunction with provided preventive and restorative visits to 5,017 low-income children through its Children's Dental Ce	ldentifier	Return Reference	Explanation							
For Paperwork Reduction Act Notice, see the Instructions for Form 990 Cat No 51056K Schedule O (Form 990) 2008	Part III, Line 4d	Part III, Line 4d Other Program Services Description	SCVHHS, was awarded \$50,000 for its Healthy Families Program, which provides homeless families with the necessary resources and support to gain full access to healthcare and to make healthy lifestyle choices that promote wellness and prevent chronic diseases. The Indian Health Center, in conjunction with SCVHHS, was awarded \$127,000 to implement a Diabetes Prevention Program for low-income individuals who are at-risk for developing this chronic disease. The curriculum emphasizes the patient's role in preventing diabetes. In the AIDS Services area, 755 unduplicated individuals received services, including Social Work Case Management Services (153 clients), Level 1 Case Management (629 clients), Nursing Case Management (90 clients), Transportation Assistance (300 clients), Food Support (506 clients), Home Health (20 clients), Housing Assistance (187 clients), and Emergency Funds (259 clients). Over 5,100 visits were made to The Living Center, a support center for people living with HIV/AIDS. Key outcomes of AIDS Services included HIV medication adherence (56 1% of all case management clients), and utilization of routine HIV medical care (67 3% of all case management clients). Additional outcomes achieved included increased capacity to remain in stable, affordable and perment housing and improved nutrition. The Chronic Disease Self-Management (CDSM) classes were held throughout 2009, and during FY2009 471 unduplicated individuals participated in the classes, consisting of six weekly group sessions. Key CDSM outcomes under evaluation include an increase in behaviors that help manage disease such as physical activity and healthy eating, reduction in disease symptoms, increased self-efficacy for disease management, and reduction in hospitalizations—"Oral Health. The Health Communities Initiative seeks to ensure access to services, including oral health services that encompass home—and community-based oral health education and clinical services. During FY 2009, 167 children and their families received oral health educ							

Additional Data

Software ID: Software Version:

EIN: 94-6050231

Name: The Health Trust

Form 990, Part VII - Section Aaa

		(C) Position (check all that apply)							(E)	(F)
(A) Name and Title	(B) Average hours per week	Individual Trustee or Director	Institutional Trustee	Officei	Key employee	Highest compensated employee	Fornier	(D) Reportable compensation from the organization (W- 2/1099MISC)	Reportable compensation from related organizations (W- 2/1099-MISC)	Estimated amount of other compensation from the organization and related organizations
Todd Hansen , COO	40 00			Х				205,854	0	46,435
Sue Wuerflein , Board Member	2 00	Х						0	0	0
Richard Triolo , Board Member	2 00	Х						0	0	0
Paul Huber , Board Member	2 00	Х						0	0	0
Paul Hepfer , VP programs	40 00					Х		114,650	0	9,719
Mıchael Barsantı , Board member	2 00	Х						0	0	0
Martın Fıshman MD , Board Member	2 00	Х						0	0	0
Judy Heyboer , Board Member	2 00	X						0	0	0
Ivonne Montes de O ca , Board Member	2 00	Х						0	0	0
Ira Holtzman , CFO	40 00			Х				184,649	0	31,009
Gary Allen , Former CEO							Х	97,850	0	0
Frederick Ferrer , CEO	40 00	Х		Х				242,117	0	24,855
Denise Carter , Director, FR	40 00					Х		118,379	0	11,065
Davıd Katz , Board Member	2 00	Х						0	0	0
Cındy Chavez , Board Member	2 00	Х						0	0	0
Bern Shen MD , Board Member	2 00	Х						0	0	0
Ann Danner , Board Member	2 00	Х						0	0	0
Andrew Vu , Board Member	2 00	Х						0	0	0
Ameurpino Santiago , Dir HSV	40 00					Х		116,958	0	19,766
Aımee Reedy , VP of APE	40 00			<u> </u>		Х		119,600	0	16,458

Form 990, Part III, Line 1 - Briefly describe the organization's mission:

The mission of The Health Trust is to lead the Silicon Valley community to advance wellness. Our vision is to transform Silicon Valley into the healthiest region in America through three initiatives:Healthy Living - focuses on reducing the rates of overweight and obesity through healthy nutrition and physical activity Healthy Aging - focuses on supporting the health of our aging population so they can spend more years in good health and be engaged as vital members of their communities Healthy Communities - focuses on reducing and eliminating health disparities These initiatives will make a positive impact across all of the levels of influence that affect health - from individual behaviors to broader environmental issues such as neighborhood conditions and public policies. The work of the initiatives encompasses direct client services, community and environmental change strategies, advocacy and policy strategies, and grantmaking strategies.