

WILLIAMSBURG
Health
FOUNDATION



2017
Report to the
Community

What goes into your **HEALTH?**



STRATEGIC GOALS

WHF grants support a wide variety of programs addressing health disparities, encouraging wellness, promoting personal responsibility, and providing care.

GOAL ONE

Promote lifelong wellness and informed individual choices for all who live in our community

STRATEGIES

- Invest the Foundation's resources to increase opportunities in our community for health and well-being
- Strengthen partnerships and build networks across all sectors to advance a community culture of health
- Leverage the Foundation's influence to increase community demand for health opportunities

GOAL TWO

Target resources to meet the healthcare needs of our most vulnerable community members

STRATEGIES

- Invest in programs and agencies that provide quality healthcare to the uninsured and underinsured
- Invest in programs and agencies that enable access to health services and systems to support continuity of care

GOAL THREE

Increase health opportunities by advocating for their consideration in community decisions and by strengthening agencies influencing health in our service area

STRATEGIES

- Create awareness among public and private decision makers of the health impact of local and regional policy decisions
- Build the capacities of agencies and organizations that advance the Foundation's mission

2017 Board of Trustees

David E. Bush
*Managing Director,
PBMares Wealth
Management, LLC*

Nancy N. Campbell
*Chairman, The Montpelier
Foundation*

Beth F. Davis
*Director, Patient Care
Services, Sentara
Williamsburg Regional
Medical Center*

Paul W. Gerhardt
*Shareholder; Member,
Kaufman & Canoles
Executive Committee;
Managing Director,
Kaufman & Canoles
Richmond Office;
Chair, Senior Housing
& Care Team*

Earl T. Granger, III
*Associate Vice President
for Development,
William & Mary*

F. Brian Hiestand
*Chief Investment Officer,
College of William & Mary
Foundation*

Joyce M. Jarrett
*Professor of English,
Hampton University*

Laura J. Loda
*Retired Vice President,
Human Resources,
The Colonial Williamsburg
Foundation*

Ethlyn McQueen-Gibson
*Associate Professor,
Institute of Inclusion,
Inquiry and Innovation,
Virginia Commonwealth
University*

Richard H. Rizk
*Judge, Circuit Court
for York County and
the City of Poquoson*

Maribel O. Saimre
*School Psychology
Specialist, Virginia
Department of Education*

Robert J. Singley
*President and Principle
Broker, RJS &
Associates, Inc.*

Robert B. Taylor
*Retired Senior Vice
President for Finance
and Administration,
The Colonial Williamsburg
Foundation*

Thomas G. Tingle
President, Guernsey Tingle

Jackson C. Tuttle, II
*Retired City Manager,
City of Williamsburg*

Marshall N. Warner
*Executive Vice President,
Chesapeake Bank*

Kimberly Zeuli
*Sr. Vice President,
Initiative for a Competitive
Inner City (ICIC)*

CHAIR

James R. Golden
*Senior Counselor to the
President, William & Mary*

VICE CHAIR

Louis F. Rossiter
*Founding Member,
New Health Analytics;
Retired Research
Professor, Thomas
Jefferson Program in
Public Policy; Director,
MBA Health Sector,
William & Mary*

TREASURER

Clarence A. Wilson
*Retired Director of
Finance, DuPont Company*

SECRETARY

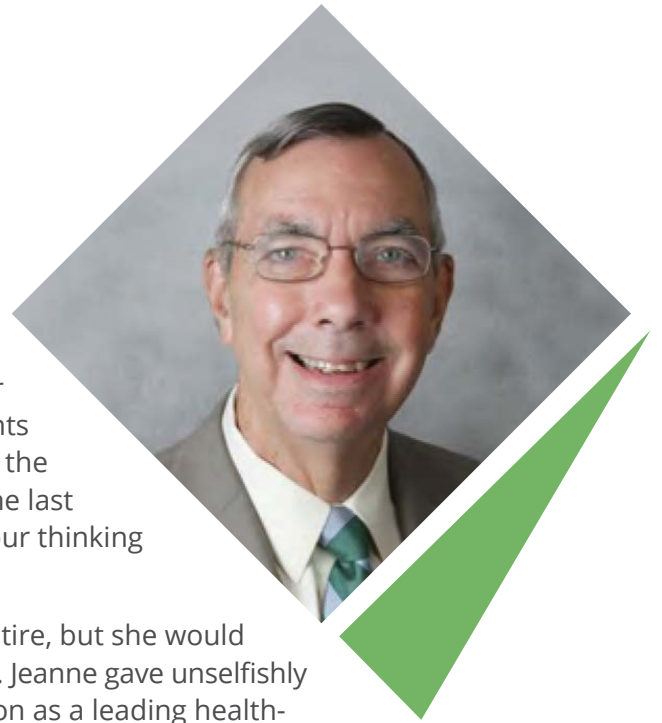
Jeanne Zeidler
** President & CEO,
Williamsburg Health
Foundation*

IMMEDIATE PAST CHAIR

Jeffery O. Smith*
*Superintendent,
Hampton City Schools
ex-officio

Letter from the CHAIR OF THE BOARD OF TRUSTEES

The Health Foundation mission is to inspire collaboration, mobilize resources, and encourage innovation to enhance the health and well-being of people living in Greater Williamsburg. In the last few years the Foundation has made a serious effort to expand the scope of its activities to address not only critical clinical needs of the most vulnerable people in our community, but also to address the broader social determinants of health and to advocate for consideration of those factors in the development of public policies. Our President and CEO over the last eight years, Jeanne Zeidler, has been instrumental in guiding our thinking about those issues, and implementing our evolving strategy.



Jeanne told us in the early fall of 2017 that she was ready to retire, but she would stay on until the board found the right person to take her place. Jeanne gave unselfishly of her time and expertise to guide the Foundation to its position as a leading health-care resource for our community. Before she left, Jeanne facilitated development of the Foundation's latest strategic plan to guide us through 2020. The plan, provided in this report, confirms the Foundation's commitment to its vision for "individuals making healthy choices in a community with health opportunity for all." Jeanne helped craft this vision. We are proud to continue it as part of her legacy.

In the fall of 2017, the Foundation launched a nation-wide search to find the right person to follow Jeanne. We found that person right here close to home. In May of 2018, we welcomed Carol L. Sale as the new President and CEO. Carol is an experienced nonprofit administrator, a healthcare professional, and a prominent leader from one of our own grantee organizations, Lackey Clinic. Carol has managed teams of highly-skilled professionals in all three of our local health systems: Sentara Healthcare, Riverside Health System, and Bon Secours Health System. She is a passionate and articulate advocate for the uninsured and underserved. She currently serves as the chair of the board for the Virginia Association of Free and Charitable Clinics.

Carol's experience with healthcare delivery will be invaluable to the Foundation as it continues to support our local clinics, particularly as they navigate the transitions that will occur with Virginia's 2018 Medicaid expansion. Carol also embraces the Foundation's commitment to addressing the social determinants of health, and we look forward to her leadership in both of these vital health issues.

The past year began an important transition for the Foundation, and the board remains optimistic about its future. Thanks to all of our grantee agencies for their great service to our community. Together, we can in fact build a healthier community with expanded opportunities for all.


James R. Golden, *Chair, Board of Trustees*



Letter from the **PRESIDENT & CEO**

Let me begin by saying how thrilled I am to join in the great work of the Williamsburg Health Foundation. The impact of this board of trustees and staff on the work of the nonprofit organizations in this community has been exceptional. It's inspiring to see so many nonprofits working hard every day to better the health of our community.

With the upcoming changes to the Medicaid insurance program in the Commonwealth, we recognize there will be many challenges ahead for both local healthcare providers and residents trying to navigate these changes. We anticipate many more individuals will have access to numerous healthcare services. We are hopeful providers will achieve a stronger bottom line as they continue to care for those in need.

The Foundation will work closely with localities, key stakeholders, and providers to get the word out about Medicaid expansion and what it may mean to all involved.

The Foundation recognizes that "health" is a continuum and means different things to different people. For some health is the ability to run a 50-yard dash; to others, it means the ability to safely walk 50 feet without falling. For some it means access to life-saving healthcare; and for others it is access to healthy food. For others it means the opportunity to play soccer at a neighborhood playground; for some health means being able to get out of bed in the morning knowing they can emotionally handle the day ahead.

We are proud and humbled to come alongside the various organizations funded by the Foundation. We know we cannot accomplish our vision of *individuals making healthy choices in a community with health opportunities for all* without working in close collaboration and partnership with community organizations and with you. We encourage you to be a voice for healthy choices and policy changes that can improve the health of everyone in our community.

As you review the myriad of organizations on our grants list, we hope you are inspired to learn more about the great work they do and how you might support them with your time, talent, or treasure.


Carol L. Sale, President & CEO



GRANTS AWARDED IN 2017

A healthy life requires many factors that can determine one's overall health and well-being. At Williamsburg Health Foundation, we target grants to create a broad system opportunities for all through our **Strategic Goals**.

GOAL ONE: Community Health Promotion

Promote lifelong wellness and informed individual choices for all who live in our community



Grants to Support the Health of Children and Families

Center for Child & Family Services
kidsandfamilies.com

Violence Prevention and Intervention Program. \$35,000

Child Development Resources
cdr.org

Breastfeeding: Building Confidence and Competence .. \$ 18,000
Infant and Parent Program. \$100,000
Parents As Teachers \$ 84,000

City of Williamsburg

Child Health Initiative \$260,000

Postpartum Support Virginia
postpartumva.org

Healthy Mother, Healthy Family. \$ 5,000

United Way of the Virginia Peninsula
uwvp.org

Home for Good \$98,000

**William & Mary School of Education ,
New Horizons Family Counseling Center**
education.wm.edu/centers/newhorizons

Youth and Family Counseling. \$110,000



Grants to Support Opportunities for Active Living

The Arc of Greater Williamsburg
thearcgv.org

Fitness Program \$ 25,000

Virginia Legacy Soccer Club
valegacysoccer.com

Community Partnership \$ 20,000

Williamsburg-JCC Public School Division
wjccschools.org/our-schools/ship

School Health Initiative Program (SHIP) \$640,000

Grants to Support Access to Healthy Food



Community Housing Partners <i>communitypartnersva.com</i>	Mobile Food Pantry \$ 6,000
FISH, Inc. <i>williamsburgfish.weebly.com</i>	Health Priorities in Action \$ 3,200
Grove Christian Outreach Center <i>groveoutreach.com</i>	Children's Summer Lunch Program \$ 5,000
Peninsula Agency on Aging <i>paa-inc.org</i>	Nutritious Noontime Meals \$50,000
Virginia Peninsula Foodbank <i>hrfoodbank.org</i>	Mobile Food Pantry: Fresh Produce Program \$ 20,000

Grants for Information, Assessment, and Referral



Colonial Behavioral Health <i>colonialbh.org</i>	WMBGCARES.ORG Greater Williamsburg Network of Care (NOC) \$ 34,000 Greater Williamsburg Child Assessment Center (GWCAC) \$271,000
Peninsula Agency on Aging <i>paa-inc.org</i>	Senior Health Assistance Resource Project (SHARP) . . . \$ 96,000

Grant to Support Health Literacy



Literacy for Life at the Rita Welsh Adult Learning Center <i>literacyforlife.org</i>	Health Education and Literacy Program (HEAL) \$ 60,000
TOTAL COMMUNITY HEALTH PROMOTION GRANTS \$1,940,200	

WATER BOTTLE FILLING STATIONS

2017 Investment: \$22,600

When it comes to healthy choices, you cannot go wrong choosing to drink water. To help individuals keep their water bottles full and make the healthy choice, Williamsburg Health Foundation invested in the installation of water bottle filling stations at City of Williamsburg Parks and Recreation locations and in Williamsburg-James City County Public Schools.



2017
Report to the
Community

GRANTS AWARDED IN 2017

GOAL TWO: Healthcare

Target resources to meet the healthcare needs of our most vulnerable community members



Grants for Advanced Primary Care

Angels of Mercy Medical Mission

angelsofmercyclinic.org

Chronic Care Collaborative \$113,000

Gloucester Mathews Care Clinic

gmcareclinic.com

Chronic Care Collaborative \$100,000

Lackey Clinic

lackeyclinic.org

Chronic Care Collaborative \$420,000

Olde Towne Medical & Dental Center

oldetownmedicalcenter.org

Basic Operating Support \$450,000

Chronic Care Collaborative \$250,000

Improving Diabetic Self-Management
through Health Coaching \$ 39,500



Grants for Behavioral Healthcare

Center for Child & Family Services

kidsandfamilies.com

Multicultural Counseling and Outreach Program
for the Greater Williamsburg Area \$ 40,000

Neurofeedback Counseling Program \$ 19,000

Colonial Behavioral Health

colonialbh.org

Advancing Opioid Addiction Treatment \$ 53,000

Chronic Care Collaborative \$183,000

Intensive Outpatient Program (IOP) \$ 45,000



CHRONIC CARE COLLABORATIVE

During 2017, the four primary care clinics of the Chronic Care Collaborative saw over 6,000 uninsured or under-insured chronically-ill patients with over 24,000 patient visits. Through a “patient engagement” initiative members of the Collaborative focused on supporting patients in managing their health conditions day-to-day. Clinical outcomes continue to compare favorably with national benchmarks.

Grants to Provide Access to Prescription Medication



Olde Towne Medical & Dental Center <i>oldetownmedicalcenter.org</i>	Access to Medication Program (AMP)\$ 24,000
Rx Partnership <i>rxpartnership.org</i>	Chronic Care Collaborative.....\$ 35,000 Access to Medication Program (AMP)\$ 50,000
Virginia Health Care Foundation <i>vhcf.org</i>	Greater Williamsburg Medication Access Program (GWMAP)\$400,000

Grants for Access to Services

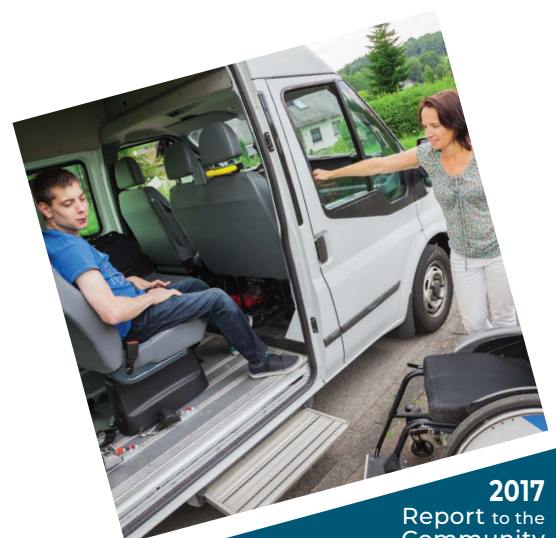


The Doorways <i>thedorways.org</i>	Patient and Family Access Program\$ 12,000
Foundation For Rehabilitation Equipment & Endowment (FREE) <i>free-foundation.org</i>	Independence Through Mobility Equipment\$ 25,000
James City County Fire Department <i>jamescitycountyva.gov/672/Fire</i>	In-School Trauma Response Kits\$ 28,400
Peninsula Agency on Aging <i>paainc.org</i>	RIDES\$110,000
Williamsburg Area Faith in Action <i>wfia.org</i>	Transportation to Medical Appointments\$ 50,000
TOTAL HEALTHCARE GRANTS \$2,446,900

LEVERAGING FEDERAL AND STATE DOLLARS WITH LOCAL DOLLARS FOR TRANSPORTATION

2017 Investment: \$31,000

New vans or buses worth \$175,000 transport seniors and adults with disabilities in Greater Williamsburg. Peninsula Agency on Aging now has a \$55,000 vehicle thanks to the Federal Transportation Authority and \$11,000 in “local match dollars” provided by the Foundation. In 2017, Williamsburg Health Foundation and Williamsburg Community Foundation contributed \$20,000 and \$4,000 respectively to enable the Arc of Greater Williamsburg to leverage over \$100,000 for two brand new vans. With its partners, the Foundation brings federal and state dollars to work in our local community.



GRANTS AWARDED IN 2017

GOAL THREE: Strengthening Agencies

Increase health opportunities by advocating for their consideration in community decisions and by strengthening agencies influencing health in our service area



Grants to Build Agency Capacity

Lackey Clinic

lackeyclinic.org

Volunteer Recruitment Program \$ 6,500

Williamsburg Area Faith in Action

wfia.org

Support for a Development Director \$ 56,000

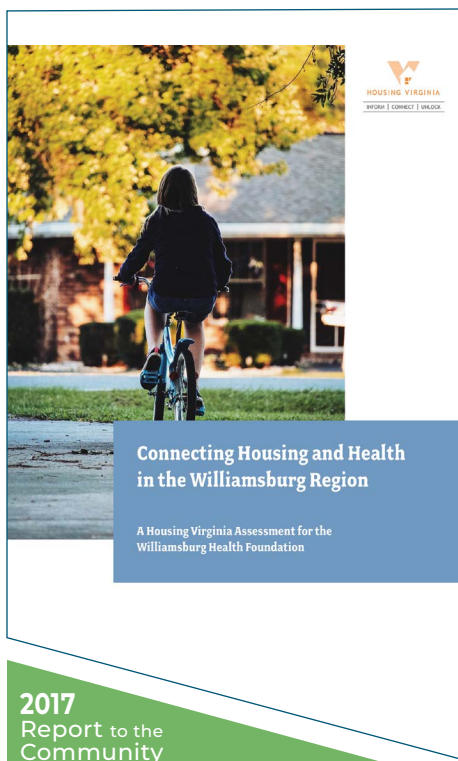
TOTAL STRENGTHENING AGENCIES GRANTS \$ 62,500



Small grants, research and evaluation, and annual award

Small grants, research and evaluation, and annual award \$191,473

TOTAL AMOUNT OF GRANTS AWARDED FOR 2017 \$4,641,073



HOUSING AND HEALTH

Both *where you live* and *how much of your income you pay to live there* impact your health. In 2017, the Williamsburg Health Foundation published a report, *Connecting Housing and Health in the Williamsburg Region*, by Housing Virginia (housingvirginia.org). In our community, over 6,500 households spend more than half of their monthly income in rent or mortgage, leaving limited funds for other basic needs. Living in a cost-burdened household correlates to lower life expectancy. For a copy of this report, visit the Williamsburg Health Foundation website.

In November, the Foundation gathered together the authors of three different housing reports in our area for a panel discussion about the challenges and opportunities for housing in the Williamsburg region. In 2018, the Williamsburg Health Foundation is convening the Williamsburg Housing Collaborative to advance this work through the collaboration of community partners.

Williamsburg Health Foundation

FINANCIAL SUMMARY

Founded as a result of the 1996 merger of the Williamsburg Community Hospital and Sentara Healthcare Systems, Williamsburg Health Foundation is a private foundation often categorized as a “health legacy” or “hospital conversion.” Like most private foundations, WHF must distribute a minimum of five percent of its investments annually through grants and expenses related to our mission “. . . to enhance the health and well-being of people living in the Greater Williamsburg area.” The Foundation’s primary investment objective is to provide financial support to fulfill its mission in perpetuity. To achieve this, a return on investment of its assets must keep up with inflation, cover the cost of operations, and provide funds for distribution as grants.

Sola Moniz, MBA, joined the Williamsburg Health Foundation as Chief Financial Officer in early 2018. Prior to her role at the Foundation, she served as the CFO of the National Domestic Workers Alliance.



Sola Moniz
Chief Financial Officer

Summary Statements of Financial Position

As of December 31

	2017	2016
TOTAL ASSETS	<u>\$125,921,000</u>	<u>\$116,524,000</u>
Liabilities: Grants and Other Accounts Payable	717,000	739,000
Unrestricted Net Assets	<u>125,204,000</u>	<u>115,785,000</u>
LIABILITIES AND NET ASSETS	<u>\$125,921,000</u>	<u>\$116,524,000</u>

Summary Statements of Activities

Ended December 31

UNRESTRICTED REVENUE AND GAINS (LOSSES)

Investment Income and Gains (Losses), Net of Fees	<u>\$15,633,300</u>	<u>\$4,203,000</u>
EXPENSES		
Community Grants	4,618,800	4,807,000
Program, General and Administrative Expenses	1,352,500	1,344,000
Federal Excise and State Tax (Benefit) Expense	242,000	6,000
	<u>6,213,300</u>	<u>6,157,000</u>
CHANGE IN NET ASSETS	9,420,000	(1,954,000)
NET ASSETS, BEGINNING OF YEAR	<u>115,784,000</u>	<u>117,738,000</u>
NET ASSETS, END OF YEAR	<u>\$125,204,000</u>	<u>\$115,784,000</u>



Front l-r: Jeanne Zeidler, Williamsburg Health Foundation; Al Boswell, Colonial Behavioral Health; John R. Kuplinski, Virginia Peninsula Regional Jail; Jim Golden, Williamsburg Health Foundation; David Coe, Colonial Behavioral Health; Jane Burnette, James McCorry and Adria vanHoozier, Riverside Doctors' Hospital Williamsburg.

Back l-r: Jay Sexton, Williamsburg Police (Ret); Tim Renwick, James City County Police; Jay Faggart; Don Janderup, Williamsburg Police; Corey Trench, NAMI Williamsburg; Brad Rinehimer, James City County Police.

Williamsburg Health Foundation's 2017 Annual Award Presented To **COLONIAL AREA CRISIS INTERVENTION TEAM**

Led by Colonial Behavioral Health, members of the Colonial Area Crisis Intervention Team have changed the way in which someone experiencing a mental health crisis in Greater Williamsburg and beyond is encountered, understood, and treated. Members include:

- Colonial Behavioral Health
- Virginia Peninsula Regional Jail
- Williamsburg Police Department
- Poquoson Police Department
- Eastern State Hospital
- The Pavilion at Williamsburg Place
- Virginia Veteran and Family Support
- Hampton/Newport News CIT
- Williamsburg Alzheimer's Association
- Saint Bede Catholic Church Social Outreach
- Riverside Doctors' Hospital Williamsburg
- James City County Police Department
- York-Poquoson Sheriff's Office
- Colonial Williamsburg Foundation – Security
- National Alliance on Mental Illness – Williamsburg Chapter
- Riverside Behavioral Health Center
- Department of Magistrates / 9th Judicial District
- James City County Commonwealth Attorney's Office
- The College of William & Mary Police Department

According to Eastern State Hospital's Dr. Kristen Hudacek, "As psychiatric institutions have reduced their bed capacity, persons with mental illness have ended up in jail. Jails have become the *de facto* mental health system."

One way to stem the tide of individuals with serious mental illness spending time in jail is to change how law-enforcement officers and other first responders manage encounters with individuals suffering a mental health crisis. Since the Crisis Intervention Team Assessment Center opened at Riverside Doctors' Hospital, its team has managed nearly 2500 interventions, helping individuals engage in appropriate treatment rather than become unnecessarily involved in the criminal justice system.

According to David Coe, Executive Director of Colonial Behavioral Health, "We tend to be very understanding of cancer, diabetes, and other chronic conditions *except for serious mental illness*. It has become stigmatized over time. We think it's different. We have to remember, the brain is an organ of the body."

VISION

Individuals making healthy choices in a community with health opportunities for all.

MISSION

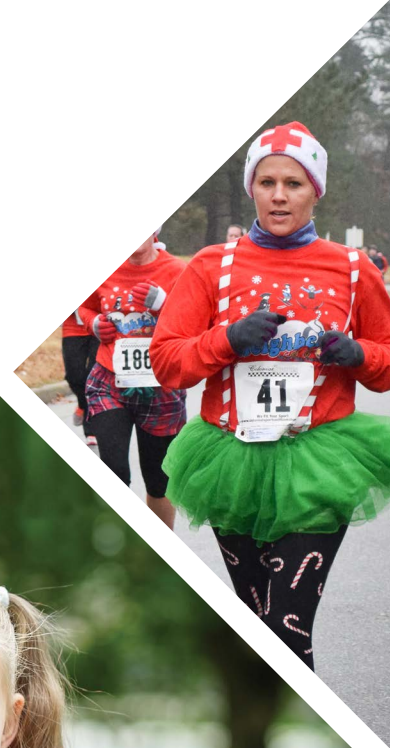
Inspire collaboration, mobilize resources, and encourage innovation to enhance the health and well-being of people living in Greater Williamsburg.

VALUES

We are...bold innovators, responsible decision makers, evidence-based actors, collaborative partners.

STRATEGIC STATEMENT

Provide resources in perpetuity to identify and communicate community health needs; serve as a catalyst for collaborative approaches to meet those needs; strengthen organizations to increase their impact; help fill gaps in the delivery of services to the most vulnerable populations; promote lifelong wellness; assess progress; and celebrate success in our service area.



757.345.0912

williamsburghealthfoundation.org

4801 Courthouse Street, Suite 200
Williamsburg, VA 23188