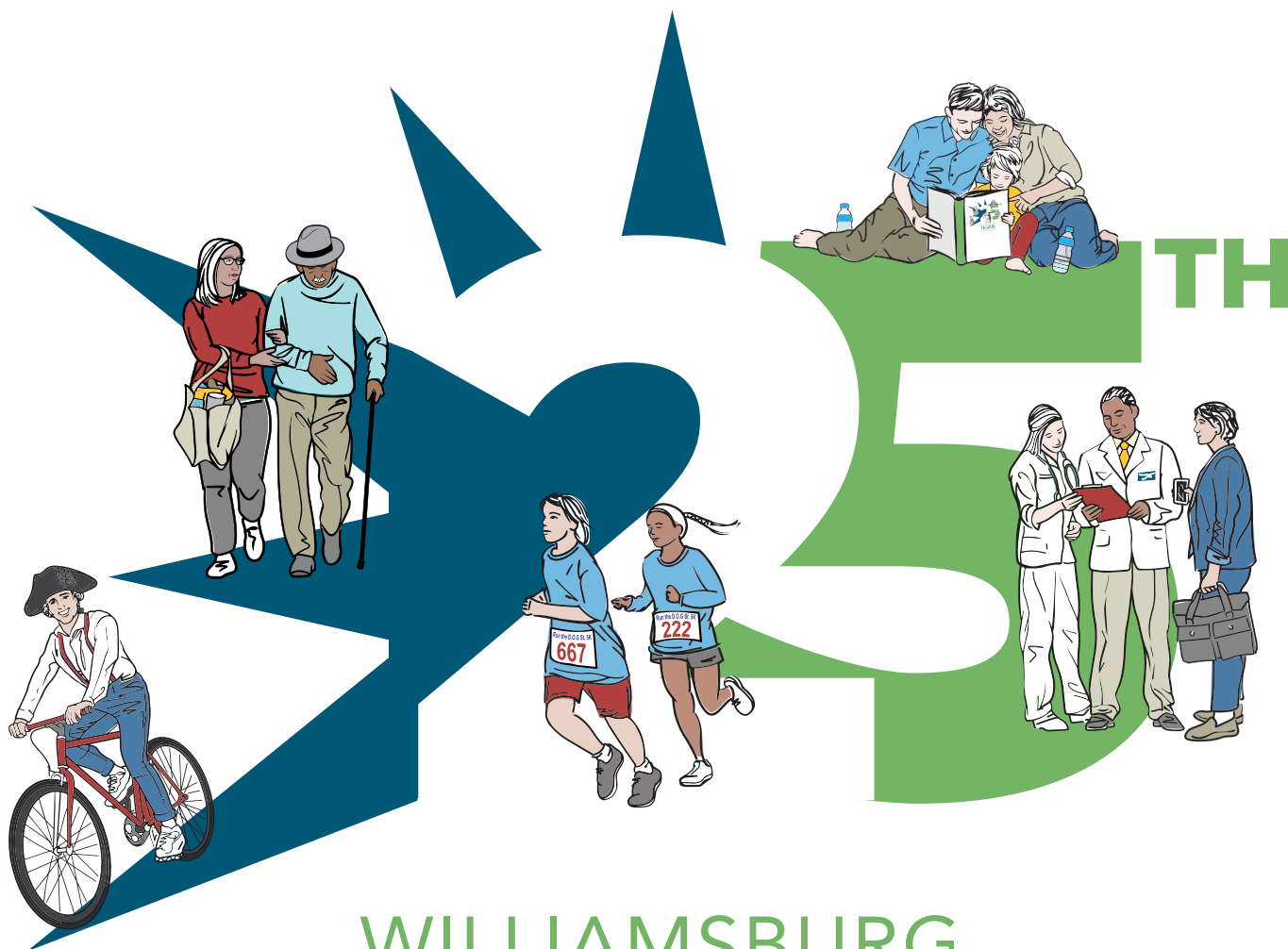


Report to the
Community
for 2021



WILLIAMSBURG
Health
FOUNDATION

Celebrating 25 Years!

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



Vision

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



Mission

Collaborate, innovate, and invest to impact systems that improve the health and well-being of individuals living in Greater Williamsburg.



Goals

Advance organizations, systems, and public policy crucial to community health and well-being.

Target behavioral and social risk factors that influence the health of individuals throughout the life span.

Strengthen the healthcare safety-net for uninsured and underinsured individuals.



Values

Accountable: Steward community values and assets transparently.

Ethical: Work with honesty and integrity.

Respectful: Ensure all voices are heard and recognize those who do the work.

Engaged: Connect and commit to the community.

Catalytic: Instigate change to achieve real, measurable impact.

2021-23 Strategic Plan

2021 Board of Trustees

M. Anderson Bradshaw

Attorney, M. Anderson Bradshaw, P.C.

Elizabeth De Falcon, M.D.

Staff Physician, William & Mary

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Shareholder; Member, Kaufman & Canoles Executive Committee; Managing Director, Kaufman & Canoles Richmond Office

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Beth F. Davis

Director, Patient Care Services, Sentara Williamsburg Regional Medical Center

Treasurer

Alfred L. Woods

Former Chairman, Aegion Corporation

Secretary

Carol L. Sale

President & CEO, Williamsburg Health Foundation

1996

In partnership with Sentara Healthcare, the assets of the Williamsburg Community Hospital become the assets of the newly formed Williamsburg Health Foundation.

SENTARA™

1997

Williamsburg Health Foundation receives its "Letter of Exemption" from the IRS. In 2004, WHF officially becomes a private foundation.



25 Years. 25 Milestones.

1997

First grants equal \$800,000. To date, 25 years later, WHF has granted over 95 million dollars.

1997

WHF publishes an annual "Report to the Community" about its grants, endowment, and activities.

1997

WHF begins to fund medical transportation for older adults, a program that continues today.

1999

to 2013, WHF celebrates Healthcare Heroes starting with first honorees Dr. J. Blaine Blayton Award for Outstanding Volunteer; Dr. Baxter L. Bell Award for Outstanding Employee; and The Reverend Thomas Pugh Award for Outstanding Community Health Program.

2003

WHF funds multiple AED defibrillators, beginning its work to make the built environment of Greater Williamsburg safer and healthier. WHF funds water-bottle filling stations, bike racks, and playgrounds, among other "health opportunities."

From our President & CEO

As we emerge from the worst of the pandemic and learn to live within the guardrails of safe interaction, it is with great pleasure and gratitude that we look back on the Williamsburg Health Foundation's first 25 years.

The Williamsburg Health Foundation (WHF) was born out of a difficult dilemma that faced many communities in the 1990s: Continue business as usual and operate a limited community hospital? Or merge with a larger health system to build a hospital with advanced technology and more expansive medical capabilities?

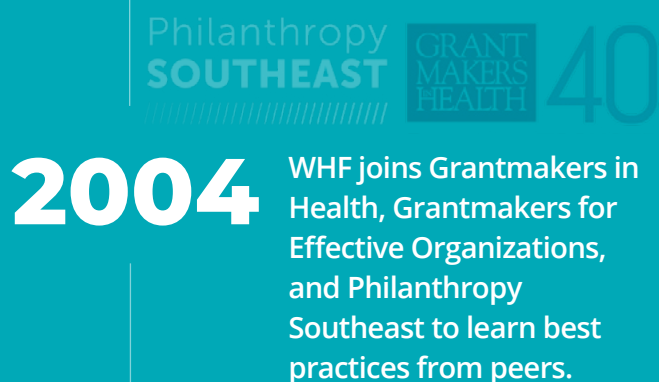
In Williamsburg, it was a bold decision guided by the wisdom and vision of Vernon "Bud" M. Geddy, Jr. The merger did bring the resources and technology of a larger, nonprofit hospital system to Greater Williamsburg. It also created the financial basis for all that the Williamsburg Health Foundation has provided to numerous nonprofit organizations through the years.

The Foundation began in 1996 with an initial corpus of \$55 million. With the careful oversight of the Foundation's board of trustees, by the end of 2021, the assets of the Foundation were valued at nearly \$158 million. During those 25 years, the Foundation granted more than \$95 million to the Greater Williamsburg community.

Today, WHF's mission is to innovate, invest, and collaborate closely with numerous community partners to improve the health and well-being of individuals living in Greater Williamsburg.

Continuous learning and the courage to meet the future are the hallmarks of any solid foundation. In 2021, WHF endeavored to learn about what the future of integrated health care could look like in Greater Williamsburg—and issued a request for information to inform its thinking. Looking at the proposals received and the many merits of each, WHF awarded a contract in July of the current year (2022) to the Community Access Network (CAN) of Lynchburg, Virginia, to plan how they might work with community partners to establish a fully integrated system of safety-net health care in Williamsburg. Together with CAN, WHF envisions a future with the integration of behavioral and medical care in every patient visit, and with shared electronic health records as well as an on-site, full-service pharmacy. We look forward to their learning from our community partners over the next year to realize this vision.

WHF's work has evolved over the years. The Foundation has expanded its view of health to include a focus on:

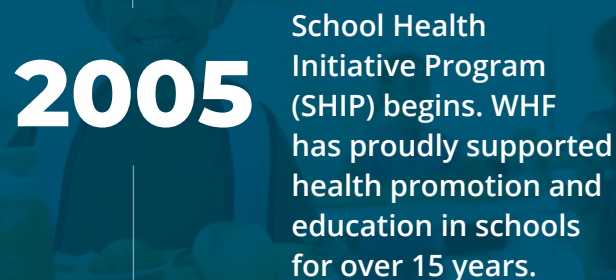
A teal-colored rectangular graphic. In the top left, the text "Philanthropy SOUTHEAST" is written in white, with "SOUTHEAST" in a larger, bold font. To its right is a small logo for "GRANTMAKERS HEALTH" and a large, faint number "40". In the bottom left, the year "2004" is written in large, bold white font. To its right, the text "WHF joins Grantmakers in Health, Grantmakers for Effective Organizations, and Philanthropy Southeast to learn best practices from peers." is written in white.

Philanthropy
SOUTHEAST

GRANTMAKERS
HEALTH

40

2004 WHF joins Grantmakers in Health, Grantmakers for Effective Organizations, and Philanthropy Southeast to learn best practices from peers.

A dark teal-colored rectangular graphic. In the background, there is a faint image of a group of people. In the bottom left, the year "2005" is written in large, bold white font. To its right, the text "School Health Initiative Program (SHIP) begins. WHF has proudly supported health promotion and education in schools for over 15 years." is written in white.

2005 School Health Initiative Program (SHIP) begins. WHF has proudly supported health promotion and education in schools for over 15 years.

- healthy eating and active living
- the social determinants/influencers of health such as income, level of education, and where one lives
- advocating for and supporting healthier systems.

We look forward to the next 25 years and the opportunities that exist to help this community achieve optimal health for all residents. We are grateful to the staff and trustees who preceded us and who have built this organization's success over time.

On a personal note, this will be my last letter to the community as I will retire at the end of 2022. It has been my privilege and honor to serve the community in this capacity and to work with an outstanding board of trustees and staff fully committed to improving the health of the Greater Williamsburg area. Thank you.



With gratitude,

Carol L. Sale, RN, MSN
President & CEO

“Health is a dynamic state of complete physical, mental, and social well-being and not merely the absence of disease or infirmity.”

– World Health Organization

2005

WHF grants \$1,000,000 to help build the R.F. Wilkinson Family YMCA.

2006

WHF begins LEAD, a seminar program to promote Leadership, Education, and Development for nonprofit organizations.

2021 Grants Awarded



Capacity Building

Greater Williamsburg HEARTSafe Alliance

heartsafewmbg.com

Greater Williamsburg HEARTSafe Alliance . . \$10,000

United Way of the Virginia Peninsula

uwvp.org

Greater Williamsburg Trauma-Informed
Community Network \$22,500

NetworkPeninsula

networkpeninsula.org

Nonprofit Management Institute \$22,500

One Child Center for Autism

onechildcenterforautism.org

Financial Management \$10,000



Two Generation Family Services

Child Development Resources

cdr.org

Basic Operating Support \$200,000

City of Williamsburg

Child Health Initiative \$265,000

James City County

Child Health Initiative \$265,000



Healthy Eating, Active Living

The Arc of Greater Williamsburg

thearcgw.org

Fitness Program \$35,000

Community Housing Partners

communitypartnersva.com

Mobile Food Pantry \$5,000

One Child Center for Autism

onechildcenterforautism.org

Kids' Night \$4,000

Virginia Peninsula Foodbank

hrfoodbank.org

Mobile Food Pantry \$35,000

Williamsburg House of Mercy, Inc.

williamsburghouseofmercy.org

Mobile Food Pantry \$6,000

Williamsburg-James City County

Public Schools

wjccschools.org/academics/ship

School Health Initiative Program (SHIP) . . \$670,000

2007

WHF launches the Chronic Care Collaborative (CCC)— A community-health learning group of safety-net clinics, Colonial Behavioral Health, pharmaceutical providers, and local hospitals.

2008

WHF launches the Children's Behavioral Health Provider Network to bring together public and private nonprofit providers of behavioral health services to children and adolescents.

2009

WHF elects its first female chair of the board of trustees, Nancy N. Campbell. In 2015, Dr. Jeffrey O. Smith, the first African-American board chair, is elected.

2021 Grants Awarded



Healthy Aging

Foundation for Rehabilitation Equipment & Endowment (F.R.E.E.)

free-foundation.org

F.R.E.E. of Williamsburg \$26,000

Honoring Choices Virginia

honoringchoices-va.org

Educating Advocates for
Advance Care Planning (ACP) \$15,000

James City County

jamescitycountyva.gov/3932/guardianship

Greater Williamsburg
Guardianship Navigator \$73,000

Peninsula Agency on Aging (PAA)

paainc.org

Greater Williamsburg Aging and Disability
Resource Center (ADRC) \$80,000

Nutritious Noontime Meals \$65,000

PAA RIDES \$120,000

Williamsburg Area Faith in Action

wfia.org

In-Home Support Services for Seniors .. \$30,000

Medical Transportation \$25,000



Advanced Primary Care

Colonial Behavioral Health

colonialbh.org

Chronic Care Collaborative \$170,000

Gloucester Mathews Care Clinic

gmcareclinic.com

Chronic Care Collaborative \$300,000

Lackey Clinic

lackeyclinic.org

Chronic Care Collaborative \$520,000

Olde Towne Medical & Dental Center

oldetownemedicalcenter.org

Chronic Care Collaborative \$355,000

Support for Clinic Operations \$225,000



Medication Access

Rx Partnership

rxpartnership.org

Basic Operating Support \$60,000

Virginia Health Care Foundation

vhcf.org

Greater Williamsburg Medication

Access Program (GWMAP) \$47,000

2013

WILLIAMSBURG
Health
FOUNDATION

The Williamsburg Health Foundation drops "Community" from the name to avoid confusion with the Williamsburg Community Foundation. (The Foundation was originally known as the Williamsburg Community Health Foundation since its origin was the Williamsburg Community Hospital).

2014

WHF puts the social determinants of health at the center of its work and drafts its vision of "Individuals making healthy choices in a community with health opportunities for all."

2021 Grants Awarded



Behavioral Healthcare

Center for Child & Family Services, Inc.

kidsandfamilies.com

Multicultural Counseling and Outreach Program (MCOP)\$70,000
The Reboot Program\$103,000

William & Mary, New Horizons Family Counseling Center

education.wm.edu

Youth and Family Counseling Program ..\$95,000

Colonial Behavioral Health

colonialbh.org

Greater Williamsburg Child Assessment Center (GWCAC).....\$271,000

Postpartum Support Virginia, Inc.

postpartumva.org

Healthy Perinatal People, Healthy Babies.\$15,000



Direct Charitable Activities, Discretionary Grants, and Annual Awards

.....\$323,000



Other

Bacon Street Youth and Family Services

baconstreet.org

The Bridges Project.....\$18,000

Colonial Behavioral Health

colonialbh.org

Greater Williamsburg Network of Care (NOC).....\$30,000
Intensive Outpatient Program (IOP)\$50,000

The Doorways

thedorways.org

Support for Operations\$15,000

Literacy for Life at the Rita Welsh Adult Learning Center

literacyforlife.org

Health Education and Literacy Program (HEAL) in Williamsburg.....\$40,000

\$4,691,000

total amount of grants
awarded for 2021

2015

WHF gives inaugural grants for a Child Health Initiative that uses a two-generation intervention approach to improve the health of children.

2015

WHF partners with KABOOM! and neighborhood organizations working in Williamsburg's Grove community to build a playground. The next year, WHF partners with the Chickahominy Community Improvement Organization, KABOOM!, and others to build another playground.



WHF Financial Summary

The Foundation's primary investment objective is to provide financial support to fulfill its mission in perpetuity. In 2021, the Foundation awarded 4.69 million dollars in grants to local nonprofits.

Summary Statements of Financial Position

(in thousands)

As of December 31

| | 2021 | 2020 |
|--|-----------|-----------|
| TOTAL ASSETS | \$158,400 | \$137,900 |
| Liabilities: Grants and Other Accounts Payable | 600 | 600 |
| Unrestricted Net Assets | 157,800 | 137,300 |
| LIABILITIES AND NET ASSETS | \$158,400 | \$137,900 |

Summary Statements of Activities

(in thousands)

As of December 31

UNRESTRICTED REVENUE AND GAINS (LOSSES)

| | | |
|---|----------|----------|
| Investment Income and Gains (Losses), Net of Fees | \$26,900 | \$16,800 |
|---|----------|----------|

EXPENSES

| | | |
|--|---------|---------|
| Community Grants | 4,700 | 5,700 |
| Program, General, and Administrative Expenses | 1,585 | 1,524 |
| Federal Excise and State Tax (Benefit) Expense | 115 | 76 |
| | \$6,400 | \$7,300 |

| | | |
|--------------------------------------|-----------|-----------|
| CHANGE IN NET ASSETS | 20,500 | 9,500 |
| NET ASSETS, BEGINNING OF YEAR | 137,300 | 127,800 |
| NET ASSETS, END OF YEAR | \$157,800 | \$137,300 |

2017

WHF publishes "Connecting Housing and Health in the Williamsburg Region," research that marks the beginning of WHF's advocacy for affordable housing and continues its practice of original research.

2018

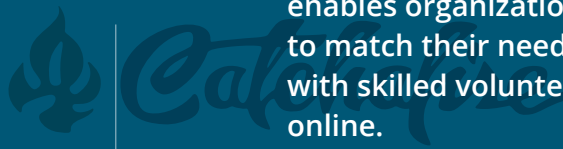
nmi
NONPROFIT
MANAGEMENT INSTITUTE

WHF gives its first grant to support the Nonprofit Management Institute founded and presented by NetworkPeninsula in partnership with Virginia Peninsula Community College.

2018

WHF helps to educate the community on how to access newly expanded Medicaid benefits.

2019



WHERE TALENT MEETS PURPOSE

WHF sponsors its first Catchafire cohort, an organizational capacity-building platform that enables organizations to match their needs with skilled volunteers online.



WILLIAMSBURG
Health
FOUNDATION

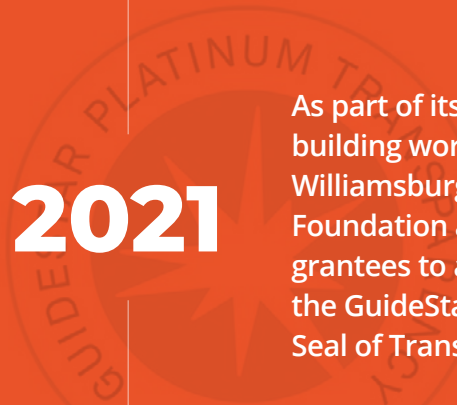
2020

Close as a COMMUNITY

even at a distance.

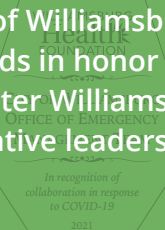
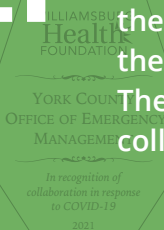
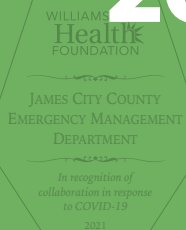
through 2021, WHF helps lead a coalition of community partners to keep Greater Williamsburg as safe and healthy as possible during the COVID-19 pandemic.

2021



As part of its capacity-building work, Williamsburg Health Foundation asks all grantees to achieve the GuideStar Platinum Seal of Transparency.

2021



The Williamsburg Health Foundation celebrated *Lasting Innovations: Beyond the Pandemic* as the theme for the 2021 annual awards, which were presented online. The emergency management departments of the City of Williamsburg, James City County, and York County received the awards in honor of their efforts and innovations during the pandemic. The Greater Williamsburg community benefited greatly from their collaborative leadership and steadfast commitment to public health.

757.345.0912

williamsburghealthfoundation.org

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