

Nurturing Health and Hope



to Grow a Healthier Community

2 0 0 5 A N N U A L R E P O R T





VISION

The Carlisle Area Health & Wellness Foundation will be a leader and catalyst to ensure continuous improvement of health in our communities.

MISSION

The Carlisle Area Health & Wellness Foundation identifies and addresses health care needs and policies, promotes responsible health practices and enhances access to and delivery of health services.

VALUES

The Carlisle Area Health & Wellness Foundation values health education and the empowerment of individuals and organizations dedicated to the improvement of health as well as the attributes of excellence, integrity, equity, fairness, responsiveness, stewardship and openness.

HISTORY

The Foundation was created in June 2001 from the sale of the Carlisle Hospital and Health Services, Inc. and the transfer of income from related endowments and trusts. Our focus is to support health-centered programs through the awarding of grants and to be proactive in identifying and addressing healthcare deficiencies in the Carlisle region.

Branching Out, Bearing Fruit



By William R. Keen, Outgoing 2004-05 Chairperson
& Jane F. Burke, 2005-06 Chairperson

With our roots firmly entrenched and three-years of growth rings to measure our progress, the Carlisle Area Health & Wellness Foundation built on timely research during 2004-05 to spearhead new prevention, education and treatment projects that bring people and critical services together.

We further strengthened our relationships with grant recipients and applicants to support their missions and maximize program impact by:

- Partnering with Cumberland County and the United Way of Carlisle and Cumberland County as well as the United Way of the Capital Region to sponsor grantmaking and outcome measurement training
- Hosting “affinity lunches” to allow similar agencies to share information and resources
- Surveying all applicants to ensure that our grant process is fair and supportive.



Recognizing the importance of public policy on community wellness, the Foundation held meetings with legislators, conducted a Health Policy Forum and offered training through the Alliance for Justice. The Trustees adopted position papers that create a framework for future work on tobacco, oral and behavioral health needs.

Past Task Forces frame our community initiatives by supplementing existing resources with creative ideas and new delivery methods. We agreed to establish a model program for discounted prescriptions and funded a new psychiatric practice as two examples of bringing desperately needed strategies to life.

Our deepest thanks go to our Board, volunteers, donors, the community and providers. We pledge to a seamless transition between chairpersons to continue nurturing change that leads to better community health.

William R. Keen *Jane F. Burke*

Through Better Health Comes a Brighter Hope



By M. Elizabeth “Bets” Clever
Executive Director

In the simplest form, the Foundation’s mission is to prevent illness and promote recovery in order to infuse new life into the collective health and hope of the community. Innovation, increased communication and over \$2.3 million in grants during 2004-05 demonstrated the Foundation’s ability to facilitate advances in our community and culture.

We employed a management strategy that linked our vision with funding efforts that measure our ability to be a catalyst for healthcare improvements. Staff and Board members strive to align our programs with the needs highlighted by our task forces. Partnerships and established providers implemented multiple initiatives, such as enrollment in public health benefits and workforce training.

Trumpeting the truth behind “an ounce of prevention” as a cure for many who would otherwise suffer, the Foundation emphasized the need for effective and adequately funded prevention policies and programs. Promoting physical and mental fitness—including better nutrition and lessening the stigma around the treatment of mental illness—was adopted as a top priority.

After three years, the Foundation has channeled more than \$7 million of support for the services that brought many people to better health and kept many others from becoming ill. By efficiently engaging resources at many levels, we continue to carry out the privilege of creating hope through an ever-better healthcare environment.

M. Elizabeth Clever

Nurturing Better Health Fills the Heart with Hope

“Hope in every sphere of life is a privilege that attaches to action. No action, no hope.”

—Peter Levi, British Poetry Professor



WHEN PEOPLE FACE physical or mental health issues, living without access to services and support often results in life without hope. Everyone—regardless of age, gender, ethnic background or income—deserves access to timely and comprehensive healthcare that enables them to live every day with hope. By taking action to address the needs of those who suffer—and by preventing health conditions from impacting lives—the Carlisle Area Health & Wellness Foundation ensures that hope is more than a privilege for a fortunate few ... it becomes a promise to many.

Grant by grant, the Foundation has become a catalyst for improved healthcare. By supplying funding for new services, existing systems and program expansions, the Foundation fosters hope in the hearts of thousands whose futures are more promising thanks to the services they receive.



“The Sadler Health Center is a vital partner in the region’s response to health issues identified in CAHWF’s Regional Health.”

Sadler Health Center Corporation

Operation Support

Thousands of people who came to the convenient location of Sadler Health Center in downtown Carlisle during 2004-05 were comforted knowing that this growing facility exists to meet their healthcare needs. The Foundation approved an \$800,000 grant for Sadler in 2004-05, which provided a significant portion of the center's operating budget. Sadler provided over 14,000 patient visits during 2004-05 – more than double the number of visits for the previous year.

The Center is a vital partner in the region's response to health issues identified in CAHWF's Health Status Assessment: mental health, chronic disease management, and oral health for underserved populations. Patients receive family health, dental and mental health services.

In addition to funding operations, the Foundation's backing was critical in helping Sadler transition from a stand-alone facility to receiving "look alike" Federally Qualified Health Center status. This development made the Center financially and operationally stronger by qualifying it for cost-based reimbursement for Medicare and Medicaid patients, involving it in the Discounted Federal Drug Pricing Program and expanding its services to cover all persons.

"The growth of Sadler Health Center and its services has been tremendous. In the first year of the Center's existence, we provided 3,911 medical visits and 2,677 dental visits. During the second year, 2004-05, the Center served 4,450 individuals in 14,469 encounters with comprehensive medical, dental, health education, immunizations, healthy woman, tobacco cessation, STD screening, counseling and treatment, mental health



counseling and Health Share programs." said, Puspa Das, hired as Sadler's new Executive Director during the 2004-05 year. By utilizing continued Foundation support, its new federal status, effective partnerships with other health programs and increased community outreach, the Center's Board and management have projected significant growth in the number of patients that rely on Sadler for care.

Prescription Program Initiative

Diagnosing chronic, life-threatening conditions such as diabetes, asthma, hypertension and COPD and serious behavioral health problems is only the first critical step in guiding people toward a more healthy future. In most cases, patients require medication to improve their chances of overcoming health situations. With an additional \$200,000 to fund a pilot initiative, Sadler is receiving the assistance needed to provide prescriptions to uninsured and underinsured persons at or below 200% of federal poverty guidelines. This focused program will be open to Sadler patients and then the region over 2005-06.



"The center served 4,450 individuals in 14,469 encounters with comprehensive medical, dental, health education, immunizations, healthy woman, tobacco cessation, STD screening, counseling and treatment, mental health counseling and Health Share programs."

Perry Human Services (PHS) ***Teen and Family Support Services***

There's no disputing the sobering fact that drug and alcohol abuse among teens destroys lives and negatively impacts the community. The user's health spirals out of control, ambitions are derailed, and family and friendships are fractured. Without intervention and support, hope for a positive future fades with each drinking or drug use episode.

Using a \$17,030 Foundation grant during 2004-05, PHS firmed up plans to offer support services for teens struggling with substance abuse. The program created a new discussion group for at-risk teens and utilized new educational resources to help parents and family understand and cope with their teen's drug and alcohol abuse. To track the progress of youth and/or parents who utilize outpatient counseling, the program will include follow-up contact with participants after discharge.

PHS set a goal of assisting 40 adolescents and adults during the 2005-06 year, setting times and locations conducive to regular participation. "Our mission at Perry Human Services is to provide services that prevent drug and alcohol use by children, at the earliest possible stage and reduce abuse by adults. Having a teen group, a family/parent group as well as an Alcoholics Anonymous meeting all taking place at the same time, on the same evening, and in the same town in Perry County should help reduce the transportation and time factor barriers to participate," predicted Executive Director Glenys DiLissio.

"Without the Foundation's funding to support this new teen support group Perry Human Services would not be able to offer this service. It is a much needed support service in Perry County because there are no other teen



support groups available to assist and encourage teens to maintain sobriety and continue to walk the recovery walk."

Health Services Coordinator for Senior Citizens

To improve quality of life, communicating information about healthy living and care options—plus ensuring that citizens can travel to facilities—is as critical as providing the actual services. And for seniors living alone, knowing how to stay healthy as well as where and when to turn for assistance largely determines their ability to continue being independent.

Foundation funding enabled PHS to hire a part-time health services coordinator trained to assess the health of 20 low-income seniors living at a new apartment complex in Perry County and to assist them in obtaining services to keep them healthy and self-sufficient. The coordinator arranges on-premises presentations and publishes a newsletter to inform residents about health and human services programs. A wellness club promotes the prevention and early detection of conditions that could potentially restrict seniors' ability to live independent, fulfilling lives.



"Our service coordination program will assist seniors to tap into any and all services that would help them to live independently as long as possible."

“Many time seniors do not know where to look for help regarding services available to them. Our service coordination program will assist them to tap into any and all services that would help them to live independently as long as possible,” stated DiLissio.

YWCA of Carlisle ***Partners in Wellness***

“You have cancer.”

Patients of all ages have had their worlds turned upside down hearing this diagnosis. An uncertain future, months of aggressive therapies and concerns about mortality weigh heavily on the patient’s physical and mental health. Fortunately, through community outreach projects like the Foundation-supported “*Partners in Wellness*” program offered through the YWCA of Carlisle, hope is heightened and wellness enhanced.

Partially funded by a \$15,000 grant, complementary therapeutic services such as yoga, Reiki and massage literally touched the lives of 52 patients whose burden of battling cancer was lightened. The program netted physical and emotional benefits: participants’ energy, peace of mind and comfort were boosted, while discomfort, stress and recovery times from treatments were reduced. Even patients suffering from advanced cancer benefited from the relaxing and stimulating services offered locally.



YWCA program leader Donore Lantz plans to double the number of patients served next year. “Without the funding from the Foundation, the benefits from these services would not be available to most cancer patients, particularly low-income patients. One patient wrote us saying, ‘I felt sad about what was happening to me. After my session, I felt somewhat whole again. The experience changed my feelings and attitudes toward my sickness and my treatment... I believed that I am well.’”

Like an x-ray showing a healed fracture, these profiles provide a glowing report about how the Foundation’s 29 grants better cared for the community during 2004-05. This progressive action restored hope and warmed hearts, and will continue to propel health and wellness standards higher in the future.



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2005 Grant Recipients & Initiatives

Adams-Hanover Counseling Services, Inc. Shelter Services	Renewal for two years \$118,825	On-site mental health and substance abuse counseling at James Wilson Safe Harbour, Sadler Health Center and the Domestic Violence Services for Cumberland and Perry Counties.
AIDS Planning Coalition of South Central PA Collaboration: Steps to Getting Started	\$500	This training on collaboration was open to the region's human services.
Big Spring School District Aquatics Program	\$2000	Big Spring School District obtained aquatics equipment allowing special populations increased accessibility to the swimming pool.
Susan P. Byrnes Health Education Center Wellness at Work	\$56,612	This one-year pilot program will enhance employee wellness at seven locations with an emphasis on needs assessment, onsite wellness teams, customized plan development, trainings and evaluation.
Carlisle Area Healthcare Auxiliary Health Professional Scholarships	Renewal \$25,000	Scholarships help local students who are pursuing post-high school degrees in healthcare-related fields. Students are expected to return to CAHWF's service area to work after graduation.
Carlisle Area Religious Council (Project S.H.A.R.E.) Infant Formula and Adult Nutrition	Renewal for two years \$146,000	Infant formula, fresh fruits, vegetables and other nutritious foods are provided for persons in the Carlisle area.
CONTACT Helpline, Inc. Active Listening	Renewal \$2,907	The CONTACT Helpline, an information and referral service, was expanded to serve western Cumberland and upper Adams counties.
Cumberland Valley Diabetes Education and Awareness Fund Diabetes Awareness Day	\$2,000	A local "Diabetes Awareness Day" featured national speakers and education for the public and providers.
Diakon Lutheran Social Ministries/Tressler Perry Families Initiative	Renewal \$141,217	Intensive counseling supports Perry County children who are at risk of out-of-home placement and their families.
Perry County Counseling	Renewal \$10,000	Counseling and psychiatric services were enhanced for adults and children in Perry County.
Family Health Council of Central PA, Inc. Cumberland Perry Tapestry of Health Cooking and Nutrition	\$17,200	Funds provide cooking classes to lower-income and at-risk population to improve family nutrition.
HACC Foundation Health Professional Scholarships	Renewal \$75,000	Scholarships help local students who are pursuing post-high school degrees in healthcare-related fields. Students are expected to return to CAHWF's service area to work after graduation.
Health Share Community Partnership Prescription and Durable Medical Equipment	Renewal \$15,000	Prescription drugs and durable medical equipment are provided for low-income persons in the CAHWF area.
Hoffman Homes, Inc. Youth Fitness Center	\$9,500	Equipment was purchased for a new Fitness Center and teen obesity program.
Holy Spirit Hospital Social Service Pharmacy Fund	\$500	Short term prescription fund is available for indigent patients from the CAHWF area discharged by Holy Spirit Hospital.
Hope Station Opportunity Area Neighborhood Council Health Advocate	\$50,969	The Health Advocate program aims to reduce chronic diseases such as hypertension, diabetes and obesity; provide community education; and improve access to health care for residents of the Hope Station area of Carlisle. In addition to community-based programs, approximately 25 high-risk residents will receive individual care plans.
Hospice of Central PA Compassionate Care for Carlisle Community	Renewal for two years. \$204,327	Enhanced hospice services are available for western Cumberland and Perry Counties, including an office site, palliative care and staff training.

Join Hands Emergency Access for Prescription Medication	Renewal \$25,000	Qualifying clients are assisted with prescriptions to address life threatening needs.
2004 Health Fair	\$2,000	Blood screenings were done for individuals attending a community health fair in Perry County.
COMPASS Pilot for Perry County	\$3,000	Support and assistance is offered to help parents sign up for the Children's Health Insurance Program and other related programs.
Mooreland Elementary School Walking Program	\$1,950	Pedometers were purchased for some Carlisle Area School District students to encourage activity.
Perry County Cooperative Extension Association Strengthening Families	\$2,000	Evidence-based substance abuse prevention program was implemented for young adolescents and their families.
Perry Human Services Senior Housing Development Health and Human Services Coordinator	\$10,000	A health coordinator will be hired for a senior housing unit responsible for regular assesment and early referrals to appropriate medical resources.
Teen and Family Support Services	\$17,030	Services are starting for at risk youth and their families to include a new teen support group and an enhanced parent/family support group.
Sadler Health Center Corporation Prescription Initiative	\$200,000	Uninsured and underinsured persons at or below 200% of federal poverty guidelines will be assisted to obtain prescriptions to treat chronic, life-threatening diseases such as diabetes, asthma, COPD and hypertension or mental illness.
Operations	Renewal \$344,000 (dental) \$456,000 (physical)	Financial support provided for health center operations in 2005-06, including additional funds for a capital reserve fund.
Samaritan Fellowship, Inc. Prescriptions Plus	Renewal \$8,000	Prescription drugs and durable medical equipment is provided for low-income persons in the Carlisle area.
Substance Abuse Services, Inc. Carlisle Recovery Mobilization Effort	\$64,000	This pilot program utilizes Carlisle-area persons in recovery to create an advocacy group that will educate the public and policy makers about successful treatment of and recovery from substance abuse and alcohol addiction.
Todd Baird Lindsey Foundation Chronic Disease Management	Renewal \$20,000	Home nursing visits are offered for qualifying clients.
Prescription Assistance	Renewal \$12,000	Prescription assistance is open to qualifying clients.
Tri-County Association for the Blind Blindness Prevention Education & Health Support	Renewal \$25,000	Final year of a grant to continue health support and education services for children and adults who are visually impaired or blind.
United Way of Carlisle and Cumberland County/Success by Six Parenting Education and Prevention	\$4,480	This grant helps to print and distribute a comprehensive parenting guide.
Preschool Health Curriculum	\$20,100	A comprehensive health education curriculum will be implemented along with providing supportive materials in area preschools.
West Shore ALS, Inc. LifePak 12 Cardiac Monitor/Defibrillators	\$50,000	Five LifePak 12-lead defibrillator/monitors were purchased to upgrade and standardize emergency cardiac care for the CAHWF area. The equipment allows diagnostic quality EKG transmission to the hospital via cell phone, allowing hospital staff to prepare and direct treatment before the patient arrives.
Carlisle Family YMCA Fit for Life	\$20,873 Renewal for 2005-06: \$24,220	A comprehensive program instructs obese youth and teens with their families in activity, good fitness practices and sensible nutrition in order to improve both health and self-esteem.
YWCA of Carlisle Partners in Wellness	\$15,000 Renewal for 2005-06: \$25,000	Education and complementary therapeutic services (yoga, Reiki and massage) benefit persons diagnosed with cancer.
New Face of Fitness	\$19,202	This demonstration grant is designed to attract and retain women in an exercise program who traditionally do not feel comfortable or cannot keep up with mainstream aerobics/fitness classes. Along with activity the women aged 20-55 will receive nutritional and other health information.

CAHWF Task Force Reports Drive Community-Wide Results



The Foundation clearly demonstrated that its commitment to be an effective catalyst in the health community extends well beyond distributing grants. Paced by the extensive research and result-driven recommendations from its three task forces, CAHWF's full spectrum of initiatives created and leveraged broad partnerships to help people of all ages.

The Prevention and Education Task Force Report, "*A Framework for Health Promotion*," set the stage for creating a regional coalition of over 25 organizations to focus on nutrition and physical activity. By establishing the Carlisle Regional Advocates for Nutrition and Activity (CRANA), the Foundation and coalition members launched a three-pronged effort to encourage better nutrition and increased activity in the:

Community: identifying best practices, developing "mobile" programs and promoting the use of walking trails and parks.

Schools/youth: by developing and assisting emerging school health councils, and providing assistance in meeting the new body mass index (BMI) mandate for schools.

Workplace: developing and implementing a "Wellness at Work" pilot project to enhance employee health, knowledge and behavior.

Early efforts are encouraging. CRANA organized a "*Winning at Wellness*" Symposium for fall 2005 featuring presentations by a national walking advocate, a nationally known school health expert and the Wellness Council of America, along with regional presenters. The Foundation also partnered with the Greater Carlisle Area Chamber of Commerce to begin a "Wellness at Work" effort through seven area employers in the public, nonprofit and private sectors.

People of all ages used the Foundation's "*Simply Walking*" guide to pursue recreation activities on regional trails for hiking, biking and walking.

"*Opportunities and Challenges*," the in-depth report produced by the CAHWF Behavioral Health Task Force, also provided the direction to boost the community's response to persons struggling with mental health and substance abuse issues.

PHOTO BY: MICHAEL BUPP / THE SENTINEL



"By establishing the Carlisle Regional Advocates for Nutrition and Activity (CRANA), the Foundation and coalition members launched a three-pronged effort to encourage better nutrition and increased activity."

The Foundation's "I" (Implementation) Team applied these strategies to implement meaningful change:

- **Prevention** –partnering with mental health consumers to offer stigma reduction presentations.
- **Clinical** – creating a network to increase skills and communication among providers, consumers, persons in recovery and families.
- **Supportive** - advocating for behavioral health parity through appropriate employer education and insurance coverage.

Significant progress in responding to growing healthcare demands is being achieved through the Foundation's attention to the "Continuum of Care" report. During the 2004-05 CAHWF:

- expanded access to evaluations, treatment and consultations by funding a new psychiatric practice in Carlisle in conjunction with Adams Hanover Counseling Services;
- supported Northwestern Human Services/The Stevens Center's creation of an outpatient psychiatric team that uses a psychiatrist, a physician's assistant and a registered nurse to reduce the waiting time for outreach services and office-based treatment in Cumberland and Perry counties;
- partnered with Carlisle, West Perry and Big Spring School Districts to enhance enrollment in CHIP, the state's health insurance program for children of modest income families;
- trained providers to use "COMPASS" technology to better link people eligible for government assistance with benefits;



- funded a second dentist at Sadler Health Center to provide more low-income citizens with oral health services; and
- developed a prescription assistance initiative for the Sadler Health Center.

In addition to these health success stories, CAHWF continues to collaborate with Cumberland County, United Way of Carlisle and Cumberland County and Capital Region United Way to introduce "Outcomes Measurement" to central Pennsylvania. More than 180 people have completed the first two components of this three-level training system that helps grant recipients track meaningful improvements in program effectiveness.

CAHWF honored the inaugural winners of its "Champions of Health Award" program to recognize individuals and groups that creatively promoted and supported good health. Two awards were given recognizing the County of Cumberland and Kelly Renard of Carlisle Area School District as "Champions of Health."

Combined, this system-wide approach to identifying and responding to society's most pressing healthcare challenges raised hopes and lifted community health during 2004-05.



"Significant progress in responding to growing healthcare demands is being achieved through the Foundation's attention to the "Continuum of Care."

CAHWF Makes a Major Commitment to Public Policy Advocacy



From its beginning, the Foundation was committed to speaking up on health issues and being involved in the public policy process. Subsequently, CAHWF developed a Public Policy Committee (PPC), which held its first meeting in September 2004.

The committee contains both Board and non-Board members, including several lobbyists, government officials, and healthcare professionals. The committee members and staff have worked hard during the PPC's first year in operation and their achievements are impressive.

2004-05 Public Policy Accomplishments

- Developed process for prioritization of issues by the PPC
- Held a training on advocacy for non-profit organizations
- Completed three Position Papers: Behavioral Health, Oral Health and Tobacco (available on the Foundation website). Each position paper was based on current research and national models, as well as the Foundation's own studies and task force recommendations.
- Developed ties with policy makers on the local, state and national levels
- Held individual meetings with area elected officials to discuss local health issues
- Contacted various public officials on a variety of health issues and/or legislative proposals
- Held the first annual Legislative Breakfast & Briefing, which was co-sponsored by the Perry County Family Service Partnership Board and Sadler Health Center

The activities above position the Foundation as a leader among its peers in speaking up on health issues. We continue to monitor the policy landscape and to provide assistance and information for those involved in shaping health policy.



“We continue to monitor the policy landscape and to provide assistance and information for those involved in shaping health policy.”

Events Put Health in the Headlines

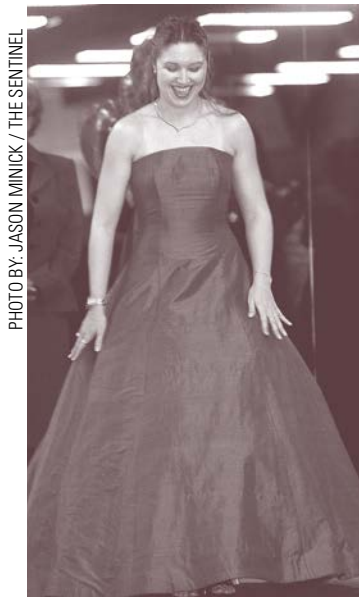


PHOTO BY: JASON MINICK / THE SENTINEL

Greater public awareness about health issues and increased participation in wellness programs were generated by a series of high-profile community events sponsored by the Foundation during the last fiscal year.

“Womens Heart Day”

CAHWF partnered with Cumberland County American Red Cross chapter, media outlets, retail stores and a bank to present a comprehensive education program about womens’ heart conditions. An expert panel offered cooking and exercise tips, information booths featured handouts on how to maintain a strong heart and a “red dress” fashion show and contest served as a visual reminder about heart health.

Mental Health Seminars

The Foundation and Northwestern Human Services/The Stevens Center used “Mental Health Awareness Month” as a platform to sponsor two presentations on the Stevens Center mind-body connection. The programs were held at Dickinson College. “Wellness: A Holistic Approach” was led by Shippensburg University Psychology Professor Dr. Kenneth France and “Wellness: A Recovery Focus” was given by Psychiatrist Dr. Luciano Picchio.

“Great Ameican Smoke-Out”

Citizens were encouraged to dine on “Cold Turkey” specials at local no-smoking restaurants as part of the Foundation-sponsored smoking cessation event held during the American Cancer Society’s “Great American Smoke-Out.” Seven eateries participated in the first-time event, which also promoted cessation classes held at Sadler Health Center.

“Sealant Saturday”

Smiles were flashed frequently by children who received free cavity-prevention tooth sealant during the first “Sealant Saturday” program at Sadler Health Center, supported by CAHWF. Families without dental insurance were invited to bring children who had never had sealant applied. Attendees also received free exams and “tooth prints,” which can be used for child identification purposes.

These Foundation programs effectively applied the principle of using citizen education and prevention measures to correct behavior and reduce incidents of poor health.



PHOTO BY: DAN GLEITER / PATRIOT NEWS

“These Foundation programs effectively applied the principle of using citizen education and prevention measures to correct behavior and reduce incidents of poor health. ”

Financial Statement July 1, 2004 – June 30, 2005

BALANCE SHEET

6/30/05

Assets

Cash and Investments—Unrestricted	\$39,737,661
Investments—Temporarily and Permanently Restricted	\$33,656,890
Land, Buildings and Equipment, Net of Depreciation	\$576,489
Intercompany Receivable	\$2,185,270
Other Assets	<u>\$1,767,309</u>
Total Assets	<u>\$77,923,619</u>

Liabilities and Net Assets

Current Liabilities	\$2,373,306
Deferred Income and Other Liabilities	\$223,070
Net Assets—Unrestricted	\$40,959,670
Net Assets—Temporarily Restricted	\$1,278,118
Net Assets—Permanently Restricted	<u>\$33,089,455</u>
Total Liabilities and Net Assets	<u>\$77,923,619</u>

STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS

Revenues, Gains and Other Support

Contributions and Income from Third-party Trusts	\$1,284,163
Investment Income	\$1,011,232
Net Realized and Unrealized Gains/ (Losses)	\$1,907,247
Fees, Rent and Miscellaneous Income	<u>\$1,468,662</u>
Total Revenues, Gains and Other Support	<u>\$5,671,304</u>

Expenses and Losses

Grants and Other Program Services	\$2,828,379
General and Administrative	\$845,888
Fundraising	\$5,654
Discontinued Operations and Subsidiary Support	<u>\$205,482</u>

Total Expenses and Losses	**	\$3,885,403
Net Increase (Decrease) in Net Assets		<u>\$1,785,901</u>
Beginning Net Assets - July 1, 2004		\$44,835,572
Restatement for Subsidiary Merger		\$28,705,770
Restated Beginning Net Assets - July 1, 2004		<u>\$73,541,342</u>
Ending Net Assets - June 30, 2005		<u>\$75,327,243</u>

** Includes Depreciation Expenses of \$292,239;
Excluding Depreciation, Expenses and Losses are \$3,593,164

The Foundation receives support from third-party held donor trusts. These contributions are determined annually by the trustees based on historical multi-year rolling averages of trust asset value and income earned on the trust investments. These monies along with returns on Foundation unrestricted investments, contributions and other income are used to fund grants, other program services and administrative costs. To maximize support to the community while managing Foundation long-term viability, the Foundation also uses multi-year rolling asset values and income to determine its annual spending budgets for grants and other services.

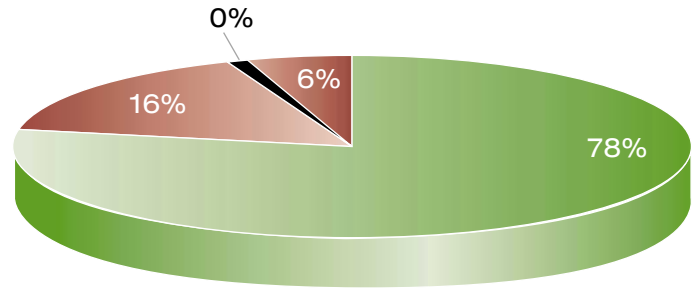
Excerpts are from the audited financial statements of the Carlisle Area Health & Wellness Foundation for the fiscal year ended June 30, 2005. The certified audit and form 990 are available from the CAHWF office.

Grants and Other Program Services	\$2,803,568
General and Administrative	\$579,874
Fundraising	\$5,095
Discontinued Operations and Subsidiary Support	\$204,627

Financial Statement July 1, 2004 – June 30, 2005

Expenses by Function

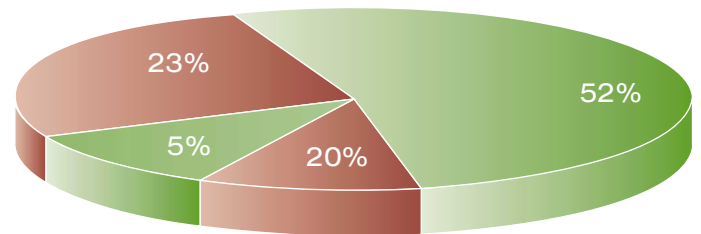
Grants, Initiatives and Other Program Services	\$2,803,568	78%
General and Administrative	\$579,874	16%
Discontinued Operations and Subsidiary Support	\$204,627	6%
Fundraising	\$5,095	0%
Total Expenses:	\$3,593,164	



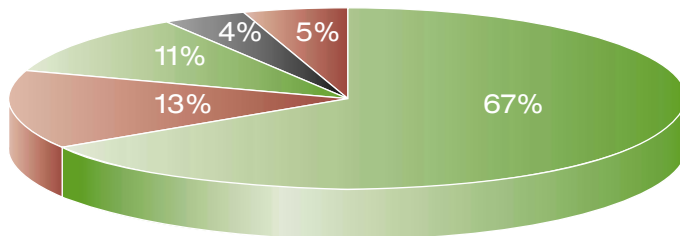
Grants & Initiatives By Focus Area

Grants by Program

Chronic Disease Management	\$1,227,931	52%
Oral Health	\$550,000	23%
Behavioral Health	\$477,248	20%
General Mission	\$119,128	5%
Total Grants:	\$2,374,307	

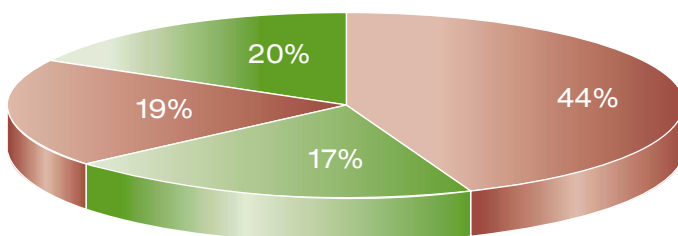


Expenses by Category



	Actual	
Grants and Support	\$2,392,911	67%
Personnel	\$485,459	13%
Professional Services	\$385,740	11%
Other	\$184,200	5%
Office and Occupancy	\$144,854	4%
Total Expenses:	\$3,593,164	

Grants, Initiatives and Other Program Services*



Chronic Disease Management	\$1,231,752	44%
Oral Health	\$550,492	20%
General Mission	\$530,749	19%
Behavioral Health	\$486,538	17%
Research and Assessment	\$2,858	0%
Public Policy	\$1,179	0%
Total:	\$2,803,568	

*Other program services include trainings, forums, evaluation and other activities supporting CAHWF's mission in addition to direct grants.

Carlisle Area Health & Wellness Foundation

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Community Services

Morgan Plant

Morgan Plant & Associates

Jackie Powell

Jackie Powell and Associates

Larry S. Rankin, MD

Community Volunteer

Robert Reitzel

Hershey Trust Company

Dave Rose

Washington Group

BOARD MEMBERS

Completing Service During 2004-05

Frances H. Del Duca, Esquire

Chris Gulotta

Reverend Rosamond B. Mason

Steve E. Orris

Robert Reitzel

NEW BOARD MEMBERS

As of July 1, 2005

Jeffrey H. Boatright

Brookwood Technologies

Sandy McNaughton

SereneVision Productions, Inc.

Terry Urich

New York Life Insurance, Co.

Lucy Johnston-Walsh

Dickinson School of Law

NEW OFFICERS

As of July 1, 2005

Jane F. Burke

Chairperson

Perry Heath

Vice Chairperson

Joyce A. Bylander

Secretary

Randolf H. Aires

Treasurer

2004-05 VOLUNTEER ROSTER

We wish to thank the following non-Board members for their service.

Members from the following for 2004-05 are from the following Coalitions and Task Forces:

Behavioral Health, Behavioral Health Implementation Team, Carlisle Regional Partnership for a Healthy Community, Enrollment, Goosens Estate and Prescriptions.

Also, CAHWF Committees: Finance, Grants, Planning and Public Policy

Name		Name	
Taylor Andrews	Behavioral Health	Sherry Hoover	Grants
Terry Barley	CPHC	Scott Johnson	Behavioral Health
Dale Beaston	Goosens	Norm Jones	Planning
Kimberly Benner	Behavioral Health	Janice Klein	Behavioral Health
L. Chris Bilger	Behavioral Health	Kurt Kraus	Behavioral Health
Harold Bricker	Behavioral Health	Harold Kretzing, MD	CPHC
Steven Bucciferro	Behavioral Health	Karen Kupris	Grants
Susan Cairo	Behavioral Health Implementation Team	Donore' Lantz	CPHC
Trish Carlucci	Planning	Evelyn Lebo	Planning
Jack Carroll	Behavioral Health Implementation Team	Ruth Lightner	Grants
Jeff Conway	CPHC	Carol Madden	Grants
Michelle Crowley	Behavioral Health Implementation Team	Janet Manwaring	Behavioral Health
Puspa Das	Enrollment	Peg McAllister	Behavioral Health
Glenys DiLissio	Behavioral Health	William McHenry	Goosens
Lori Dressler Lower	Behavioral Health	Stacie Moore	Goosens
Skip Ebert	Behavioral Health	Barbara Muller	CPHC
Thom Fager	Behavioral Health	Maureen Mulligan	Goosens
Rebekah Finkey	Behavioral Health Implementation Team	Christian Muniz	Behavioral Health
Steven Fishman	Behavioral Health	David Sarcone	Planning
Denise Francis	Behavioral Health Implementation Team	Richard Schaffner	Behavioral Health
Roderick Frazier, DDT	Public Policy	Kevin Silva	Finance
William Freeman, MD	Public Policy	Sharon Smith	Behavioral Health
H. Gasull	CPHC	Ceceile Strand	Enrollment
Stephanie Gellatly	CPHC	Carol Stuart	Prescription
BJ Genna	Behavioral Health Implementation Team	Ellie Swank	Enrollment
Scott Gobin	Prescription	Amy Talbot	Enrollment
Tom Gumby	Behavioral Health	Carol Talley	Behavioral Health
V. Jim Gurreri	CPHC	Tina Thorpe, RN	Grants
Silvia Herman	Behavioral Health Implementation Team	Kristen Vlaun	Behavioral Health
Barbara Hocking	Prescription	Julia Yost	CPHC
Ruth Hockley	Prescription		

STAFF DIRECTORY

April Ashway-Railing, Office Assistant
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Bets Clever, Executive Director
Email Address: bclever@cahwf.org

C. Lu Conser, Director of Grants
Email Address: lconser@cahwf.org

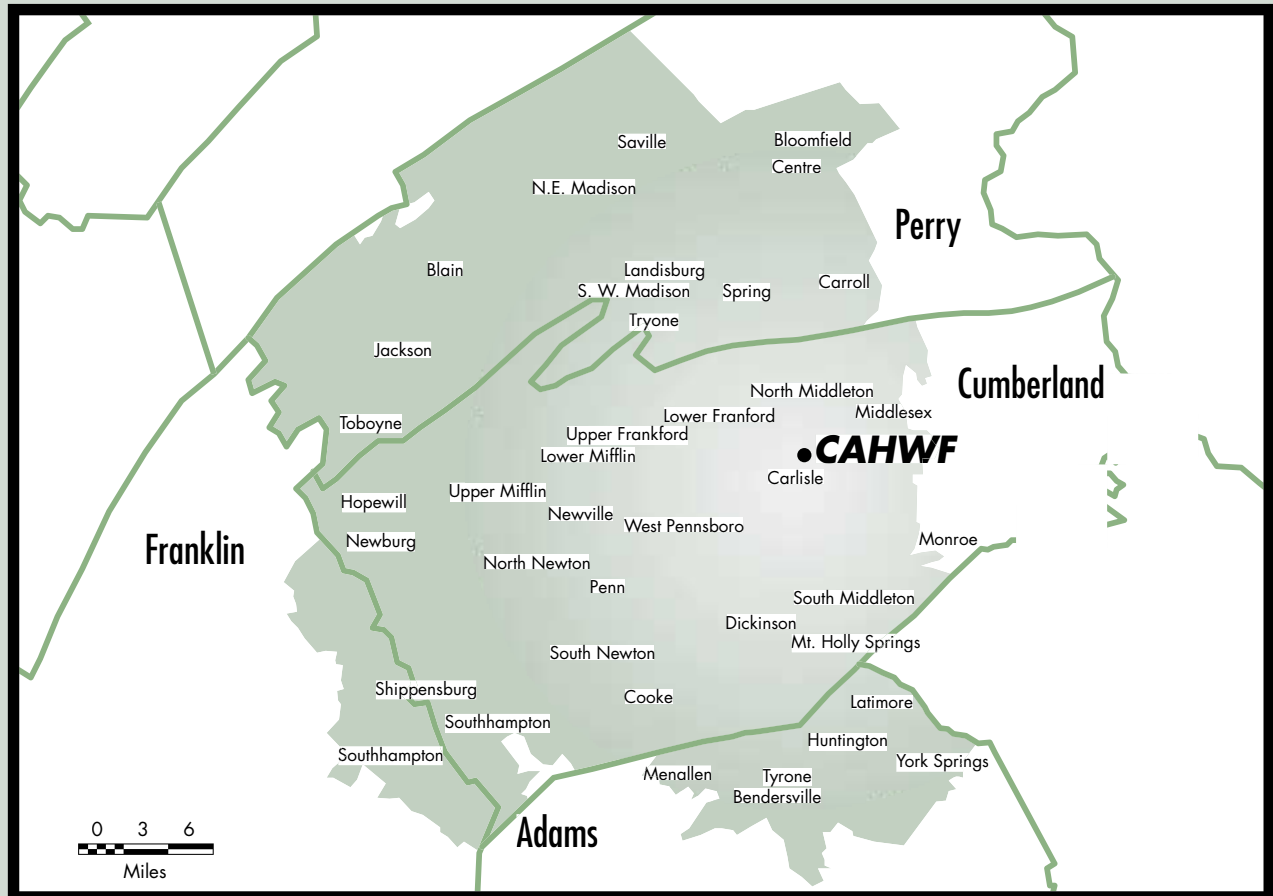
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Heather Swartz, Coordinator of Special Projects
Email Address: hswartz@cahwf.org



Publications and reports are available by contacting our office or visiting www.cahwf.org

- Carlisle Regional Health Status Assessment
- Continuum of Care Task Force Report
- A Framework for Health Promotion: Prevention and Education Task Force Report
- Opportunities and Challenges: A Study of Mental Illness and Substance Abuse Issues in Our Region
- Simply Walking: a guide to walking and hiking trails in Cumberland and Perry Counties.
- Oral Health Position Paper
- Behavioral Health Position Paper
- Tobacco Position Paper
- 2004-05 Audit





Carlisle Area Health & Wellness Foundation

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