

Carlisle Area Health & Wellness Foundation

Annual Report
2009-2010



He who plants a tree, plants a hope.

~ Lucy Larson

2009-2010 was very much of a watershed year for the foundation as we completed a major strategic planning effort and for the first time adopted two overarching organizational goals.

While the vision and mission after vetting stayed intact, the values and principles were thoroughly processed and offered in a new content. The focus areas were slightly re-aligned to better reflect the areas of desired impact based on data from the health status assessment.

The major addition was the incorporation of two strategic goals expected to have significant impact on our community. The first is to improve childhood nutrition and activity as a long term, major target for CAHWF and the second is the integration of behavioral health into primary healthcare. Both efforts will require substantive work, resources, partnership and a five to seven year commitment on the behalf of the board, staff, volunteers and community.

We are excited about preparing to build the platform to launch these ambitious and meaningful goals; yet we also remain committed to maintaining our current and valued work. As we move forward look for new opportunities to join with us to make a difference in the lives of the people in our region

Jackie Powell
Chairperson of the Board

Bets McManus
Executive Director



Jackie Powell



Bets McManus

Mission

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

Foundation Leadership

OFFICERS 2009-10

Jacqueline Powell, *Chairperson*
Thomas E. Coolidge, *Vice Chairperson and Treasurer*
Paul D. Gehris, *Secretary*

TRUSTEES 2009-10

Randolf H. Aires*
Balinge (Skip) Brown
Roger Chappelka, M.D.
John W. Friend
Perry P. Heath*
Sherry Hoover
Norm Jones
Deb Kelly
Joseph (Jay) A. Layman, Jr.
John McClellan
Patti McLaughlin *
Sandy McNaughton *
Susan Otway
Patrice Pickering*
Morgan Plant
Larry S. Rankin, MD
June L. Shomaker
Terry Urich
Carol Williams
Stephanie Williams
* Completing Service by 6/30/10

New TRUSTEES as of July 1, 2010

Mary Frances Carson
Jeffrey S. Gayman
W. Craig McLean
Stephen Winn

OFFICERS 2010-11

Jacqueline Powell, *Chairperson*
Thomas E. Coolidge, *Vice Chairperson*
Deb Kelly, *Treasurer*
Paul D. Gehris, *Secretary*

Coalition Activities & Initiatives

CRANA (Carlisle Regional Advocates for Nutrition & Activity) Coalition

WORKPLACE WELLNESS TEAM

Wellness at Work (W@W) Initiative:

- The following eight companies participated in worksite wellness programming: **Carlisle Borough-Police Department, Carlisle Regional Medical Center, Carlisle Tire & Wheel, County of Cumberland, Daily Express, Dickinson College, Giant Foods, Shippensburg University and West Perry School District.**

Wellness at Work Diabetes Initiative (HealthMapRx):

- The following four companies participating in the Wellness at Work Initiative also implemented a Diabetes Initiative: **Carlisle Regional Medical Center, County of Cumberland, Dickinson College and Keen Transport.** A team of healthcare providers works collaboratively with individuals with diabetes for improved disease management.

SCHOOLS/YOUTH TEAM

Safe Routes to Schools Initiative (SRTS):

- Hamilton Elementary and Mooreland Elementary** in Carlisle and the **Newville Elementary School** continue to implement strategies to increase the number of students who walk or ride their bicycles to school.

School Health Council:

- Two School Health Council Networking Forums were held during the course of the year. Topics included: Nutrition & Physical Fitness to address the prevalence of childhood obesity and Stress Management to provide participants with relaxation techniques and effective tools for dealing with stress.

COMMUNITY TEAM

Simply Moving Guide:

- Continued to distribute the fourth edition of Simply Moving: A Guide to Public Parks, Trails & Recreation Facilities in Cumberland and Perry Counties that was co-created with the **Cumberland County Planning Department.** Visit CAHWF's website or contact the CAHWF office to obtain a copy of the guide.

Simply Moving Walking Program:

- CAHWF partnered with the **Carlisle Parks and Recreation Department** to facilitate a "free" walking program for 6 weeks in the fall 2009 and for 8 weeks in the spring 2010. Each walking trail was selected from the Simply Moving walking guide.

SAGE (Seniors Aging with Grace & Energy) Project:

- The SAGE programming is continuing at **One West Penn (OWP)** with the **Cumberland County Housing Authority.** Programming features various activities focusing on the Six Dimensions of Whole Person Wellness – Social, Emotional, Physical, Intellectual, Vocational, and Spiritual.

Other Initiatives

- PACT (Pandemic Action Coordinating Team)** – Representatives from the **Cumberland County Red Cross, the United Way of Carlisle and Cumberland County, the Carlisle Regional Medical Center, the Cumberland County Department of Safety, and CAHWF** coordinated and facilitated "Pandemic Preparedness" trainings for the public and local businesses.
- CAB (Clean Air Board of Central Pennsylvania)** – CAHWF partnered with CAB to create the "Air Quality Advocate" position to develop educational materials concerning the harmfulness of diesel particulates and the benefits of anti-idling practices for school buses.
- The Postpartum Adjustment Task Force** – Formed to raise awareness about postpartum depression and to support the needs of mothers experiencing postpartum depression, the Task Force with **Carlisle Regional Medical Center's** partnership, created and distributed educational materials and fostered the development of a support group.
- Biddle Mission PATH (Park Access To Health)** – CAHWF supported the development of a walking path at Biddle Mission Park to support increased opportunities for physical activity.
- Pennsylvania Coalition for Oral Health (PCOH)** – In 2007, CAHWF joined with other foundations, businesses, providers advocates and the **PA Dental Association** to support a grassroots and media effort to promote the fluoridation of public water systems in Pennsylvania and other oral health efforts such as a fluoride varnish.



Grants

- Distributed \$2,273,640 in funds this year to the greater Carlisle region
- Approved 43 applications in the following categories of grantmaking:
 - Mini Grants - 12 (0-\$2K)
 - Level 1 - 9 (\$2K - \$25K)
 - Level 2 - 12 (over \$25K)
 - Healthy People Grants - 5
 - Foundation Initiatives - 4
 - Goossens Initiative - 1
- Funded 42 different organizations/agencies this year. (including Wellness @Work sites)
- Developed a Letter of Inquiry Form

Finance/Operations

- Total assets increased \$1.4 million during the fiscal year to \$64.8 million. Correspondingly our net worth increased \$1.5 million to \$62.7 million. Both are based on rebounding investments.
- Funding for grants, initiatives, and other program services decreased from \$3.1 million in FY09 to \$2.7 million in FY10. This was due to investment performance impacted by market losses in 2008. The percentage of spending for program services, our mission-related expenses, was a healthy 83%.
- Administrative cost decreased by 4% despite some line items with cost increases outside of CAHWF's control.
- The dissolution of the Perry Health Center Corporation, the last remaining subsidiary of Carlisle Hospital and Health Services, was completed and the intercompany receivable removed from the balance sheet.
- MorganStanleySmithBarney was selected as our investment consultant after an extensive selection process.

Grants & Foundation Initiatives

Approved July 2009 - June 2010

Address Obesity and Prevent Major Chronic Disease

Fit for Life – Carlisle Family YMCA –

Obese youth and teens are instructed with their families in activity, good fitness practices and sensible nutrition. Renewal \$18,260

Wellness at Work 2010-11 Carlisle Regional Advocates for Nutrition and Activity (CRANA) –

Employers engage in activities to enhance employee health around nutrition, activity and tobacco cessation. Foundation Initiative Renewal \$65,000

Project Fresh-Head Start- Clinical Outcomes Group, Inc. –

With training and technical assistance, Head Start will institute policies to decrease tobacco use and exposure to second hand smoke. Renewal \$40,000

Rail Trail Extension – Cumberland Valley Rails to Trails Council –

Land will be acquired for the trail from Newville to Carlisle to increase access and opportunities for physical activity. Foundation Initiative \$25,000

Biddle Mission Park Walking Path Downtown Carlisle Association –

A walking trail around the perimeter of Biddle Mission Park will increase opportunities for close to home activity and serve as a link to other trails. Foundation Initiative \$8,500

Newville Community Wellness 2009-10 Presbyterian Homes, Inc. –

This broad-based community collaboration improves overall health and wellness in the Newville area. Renewal \$13,700

Adult Nutrition-Access and Education Project SHARE of Carlisle –

CAHWF Funding will be used to purchase healthy food for regular distribution days and the Carlisle Farm Stand. Renewal \$80,000

Healthy Rx – Sadler Health Center Corporation –

Pharmaceutical assistance leverages free prescriptions and donated medical services. Renewal \$229,936

Tobacco Cessation – Sadler Health Center Corporation –

Tobacco cessation classes and education help people to quit smoking. Renewal \$70,403

Safe Harbour's Healthy Moves – Safe Harbour, Inc. –

This demonstration grant will provide structured fitness classes for qualifying individuals. \$10,000

Life-Fit 2009-10 – United Cerebral Palsy of Central PA, Inc. –

Persons with intellectual or developmental disabilities receive fitness and nutritional aid. Renewal \$20,000

New Shape of Fitness – YWCA Carlisle –

An exercise and education program targets overweight and inactive women. Renewal \$30,400

Partners In Wellness – YWCA Carlisle –

Education and complementary therapeutic services (yoga, massage and Reiki) benefit persons diagnosed with cancer. Renewal \$18,500

Mini Grants

Stability Balls in the Classroom – Big Spring School District/High School – High school students pilot the use of stability balls in the classroom to enhance learning and physical conditioning. \$450

Go Girls Go – Crestview Elementary School, Hamilton Elementary School and Lamberton Middle School – Carlisle Area School District – Through this afterschool program, girls will increase knowledge about nutrition and prepare to complete a two mile run. \$1,000 per school

North Dickinson Elementary School PTO – Byrnes Health Center Field Trip – Carlisle Area School District – Through interactive classroom activities, students will learn about dental health, drug and alcohol prevention, and general wellness. Renewal \$970

CONNECT – Dickinson College – Through interactive activities, at-risk middle school students receive instruction in healthy lifestyles as part of a comprehensive youth development summer program. \$1,800

Cross PA Health Ride and Kids Fitness Days – Healthy Lifestyles Foundation – Health promotion materials are provided for local school students in conjunction with a state-wide obesity awareness campaign. \$1,000

Cancer Awareness Workshop – Hope Station – Through outreach and a nutrition education/demonstration, the Hope Station area receives cancer education and support. \$500

Offer Primary Care & Related Services for the Un/Underinsured

Shippensburg Community Nurse '09-10

Civic Club of Shippensburg – Free in-home health services addresses non-acute needs of the elderly and lower-income population. Renewal \$20,500

Care Carlisle Community 2010-11

Hospice of Central PA – Hospice care is extended through an office in Carlisle with expanded services. Renewal \$79,600

Comprehensive Health Care

Sadler Health Center Corporation – A team of healthcare providers serves the un/underinsured and provides a quality driven medical home. Renewal \$297,894

Nurse-Family Partnership – Sadler Health

Center Corporation – An evidence-based program teams nurses with first-time mothers to improve pregnancy outcomes and child health/development. Renewal \$118,541

Early Intervention 2009-10 –

United Cerebral Palsy of Central PA, Inc. – A wide variety of therapies support children from birth through five years of age who have or are at risk for developmental delays. Renewal \$35,000

Western Perry Community Nurse Visiting Nurse Association of Central PA,

Inc. – A Home Care/Community Nurse program in western Perry County offers non-acute support. Goossens Initiative Renewal \$84,650

Target System-Wide Behavioral Health Issues

Support Group for Postpartum Adjustment (PPA) – Carlisle Area Health & Wellness Foundation –

PPA is addressed through a support group, materials and training in coordination with the Carlisle Regional Medical Center. Foundation Initiative Renewal \$7,680

Adolescent Substance Abuse Treatment – Gaudenzia, Inc. –

The project maintains improved access to outpatient substance abuse treatment for adolescents and their families. Renewal \$66,000

Comprehensive Clinical Team 2010 – NHS/The Stevens Center –

Psychiatric services utilize a clinical team including a full-time psychiatrist, nurse practitioner and registered nurse. Renewal \$80,000

RASE of Carlisle-Substance Abuse Services, Inc. –

Advocacy, education and buprenorphine care will reduce the stigma associated with addiction and promote recovery. Renewal \$76,011

Project Venture Upper Adams School District – The Center for Youth and Community Development –

A collaborative program builds resiliency and leadership skills to reduce alcohol, tobacco and other substance abuse use among middle school students. 2009-10 Renewal \$24,900; 2010-11 Renewal \$24,900

Focus Areas

Address Obesity & Prevent Major Chronic Disease

Offer Primary Care & Related Services for the Un/underinsured

Target System-Wide Behavioral Health Issues

Enhance Oral Health

Support Allied Healthcare Education

Refer to www.cahwf.org for details on grant application and process.

Enhance Oral Health

Oral Health – Sadler Health Center Corporation –

Dental services are provided at no or low cost to the un/underinsured. Renewal \$532,245

Support Allied Healthcare

Scholarships – Carlisle Area Healthcare Auxiliary –

Provides scholarships for eligible students in post-secondary healthcare programs. Renewal \$23,400

EMT Training & Employment – Employment Skills Center –

Emergency Medical Technicians are trained to help address healthcare shortages. Renewal \$5,000

Nurse Aide Training and Employment –

Certified nurse aides are trained and employed to address a shortage and enhance delivery of healthcare. Renewal \$37,000

Nursing and Allied Health Scholarships – HACC Foundation –

Scholarships help students pursue degrees in healthcare-related fields and are expected to return to CAHWF's region to work upon graduation. Renewal \$87,000

Healthy People Grants

No Stigma, Know Status HIV Testing AIDS Community Alliance –

The threat of AIDS will be reduced by encouraging individuals to access HIV rapid testing and learn their HIV status. Healthy People Grant \$6,300

Carlisle Early Education Center – Carlisle Day Care –

Hand washing equipment for two classrooms should reduce the incidence of disease. Healthy People Grant \$1,900

Generation Give Back Training - Cumberland County American Red Cross –

Materials support health education through a volunteer youth program. Healthy People Grant \$2,500

Mini Grants Continued

Professional Training Day with Robert Ackerman - Perry Human Services –

Training focuses on parents, school and human service leaders' awareness of strategies to foster resiliency among high-risk youth and encourage their own self-care. \$1,200

Strategic Planning Process, Board of Directors - The Mental Health Association of the Capital Region –

Development of a comprehensive strategic plan helps the MHA to expand its educational reach. \$1,000

Project Connect - United Way of Carlisle & Cumberland County –

Low income and elderly populations are linked with health, human service and home heating providers at this event. \$1,500

Early Start Eat Smart – YWCA Carlisle –

At-risk preschool children and their families will receive presentations and information to encourage healthy food choices. \$2,000

AMEND-Domestic Violence Services –

By participating in this educational process, men who batter their partners will become non-violent in their family relationships. Healthy People Grant \$12,000

Financial Management Service - Maranatha Carlisle –

Individuals with behavioral health challenges benefit from financial management services and spending plan guidance. Healthy People Grant \$7,500

FINANCIAL STATEMENTS JULY 1, 2009-JUNE 30, 2010

Balance Sheet

Assets	
Cash and investments - Unrestricted	\$34,887,596
Investments - Temporarily and Permanently Restricted	29,503,053
Land, Buildings and Equipment, net of depreciation	363,267
Other Assets	23,970
Total Assets	\$64,777,886
Liabilities and Net Assets	
Grants Payable	\$1,894,340
Other Liabilities	162,374
Net Assets - Unrestricted	33,302,769
Net Assets - Temporarily Restricted	280,699
Net Assets - Permanently Restricted	29,137,704
Total Liabilities and Net Assets	\$64,777,886

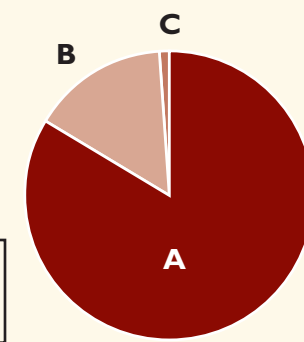
Statement of Activities and Changes in Net Assets

Revenues, Gains and Other Support	
Contributions and Income from Third-party Trusts	\$1,028,979
Investment Income	804,545
Net Realized and Unrealized Gains	4,836,006
Fees and Miscellaneous Income	314,787
Total Revenues, Gains and Other Support	6,984,317
Expenses and Losses	
Grants, Initiatives and Other Program Services	2,694,337
Management and General	580,857
Fundraising	1,958
Write-off of Intercompany Receivable	2,185,270
Total Expenses and Losses*	5,462,422
Increase in Net Assets	1,521,895
Beginning Net Assets - July 1, 2009	61,199,277
Ending Net Assets - June 30, 2010	\$62,721,172
*Includes Depreciation Expenses of \$35,167	
Total Expenses and Losses, Excluding Depreciation	
Grants, Initiatives and Other Program Services	\$2,674,179
Management and General	565,848
Fundraising	1,958
Total	\$3,241,985

Excerpts are from audited financial statements of the Carlisle Area Health & Wellness Foundation for the fiscal year ended June 30, 2010.

The certified audit and Form 990 are available at the Carlisle Area Health and Wellness Foundation office, 274 Wilson Street, Carlisle, PA 17013.

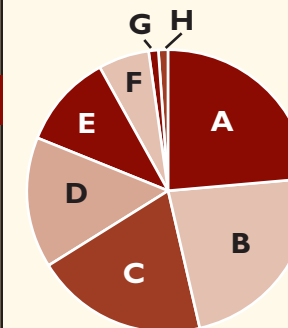
Beneficiary data for charts is taken from CAHWF grantee Final Reports 2009-2010 and reflects significant healthcare encounters provided by grantees. Also, all programs are not required to collect the same beneficiary data, hence totals do not match.



Expenses by Function (Excluding Depreciation)

Function	Amount	Percentage
A Grants, Initiatives & Other Program Svcs.	\$2,674,179	83%
B Management and General	565,848	15%
C Fundraising	1,958	0%
Total Expenses by Function	\$3,241,985	

Grants, Initiatives and Other Program Services

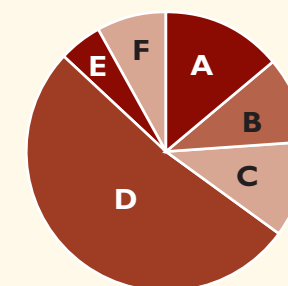


Category	Amount	Percentage
A Primary Healthcare	\$646,547	24%
B Chronic Disease Mgt.	623,489	23%
C Oral Health	532,245	20%
D General Mission	402,670	15%
E Behavioral Health	282,903	11%
F Healthcare Education	152,400	6%
G Healthy People	30,200	1%
H Public Policy	3,725	0%
Total Grants, Initiatives and Other Program Services	\$2,674,179	

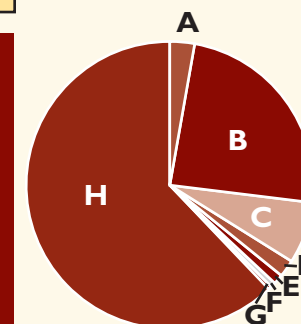
Total Grants, Initiatives and Other Program Services \$2,674,179

Age Range

Age Range	Count	Percentage
A Age 0-6 Years	3,249	14%
B Age 7-11 Years	2,394	10%
C Age 12-17	2,497	11%
D Age 18-64	12,063	52%
E Age 65+	1,091	5%
F Age Unknown	1,882	8%
Total	23,176	



Income Range



Income Range	Count	Percentage
A Income Less than \$5,000	622	3%
B Income \$5,000-\$14,999	4,528	24%
C Income \$15,000-\$24,999	1,406	7%
D Income \$25,000-\$34,999	422	2%
E Income \$45,000-\$49,999	117	1%
F Income \$50,000-\$74,999	32	<1%
G Income \$75,000+	28	<1%
H Income Unknown	11,600	62%
Total	18,755	



April Ashway - Railing, Grants Assistant
Doris Ditzler, Director of Prevention
& Education
Harold Fraker, Director of Finance
Casandra Jewell, Coordinator of
Administrative Svc.
Bets McMannus, Executive Director
Becca Raley, Director of Grants &
Public Policy
Heather Swartz, Coordinator of
Special Projects
Gail Witwer, Director of Planning

Staff



Foundation Giving
We encourage you to be confi-
dent in your charitable giving. The
official registration and financial
information of Carlisle Area Health
& Wellness Foundation may be
obtained from the Pennsylvania
Department of State by calling toll
free, within Pennsylvania, 1 (800)
732-0999. Registration does not
imply endorsement..

Carlisle Area Health & Wellness Foundation

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www.cahwf.org

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