



2016 ANNUAL REPORT



MISSION STATEMENT

Our mission is to enhance the quality of life for the people of the San Angelo area.

STATEMENT OF PURPOSE

The intent of the Foundation is to remain in operation in perpetuity and to support community health in its broadest form.

For over twenty years the San Angelo Health Foundation has served San Angelo and our Concho Valley neighbors by supporting the efforts of local non-profit organizations and public entities.



SAN ANGELO
HEALTH
FOUNDATION

If there is one thing I've learned in my years on this planet, it's that the happiest and most fulfilled people I've known are those who devoted themselves to something bigger and more profound than merely their own self-interest. —John Glenn



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Letter from the Chairman

In 2016, the Foundation reached another milestone. We have provided grants to over 200 organizations in the Concho Valley, 202 organizations to be precise, who assist the most vulnerable members of our community. These non-profits encompass health, mental health, education, public safety, arts and culture, youth programs and child development. The 2016 grant awards bring the Foundation's grant making to over \$47 million which has funded 645 projects in just over twenty years of grant making. This past year we helped provide several new programs and services:

- A brand new program was initiated by West Texas Counseling and Guidance to start a support group for individuals who have lost a loved one to suicide. An adjunct to this program is reaching out to provide bereaved people with information about resources and the provision of emotional support.
- With the loss of the senior meals program, a group of volunteers at the Eldorado Service Center were provided start-up funds to open a soup kitchen and continue serving seniors and other needy individuals with nutritional meals on a daily basis.
- The Community Development Initiatives Department at ASU was provided two years of start-up funding to become a Volunteer In Service To America (VISTA) intermediary. The volunteers they recruit and train will focus on education, health and behavioral health services.
- San Angelo Lions Charities have begun a new Cycle for Life program which provides customized bicycles for children and adults with disabilities.



In the public safety realm three Volunteer Fire Departments were assisted with trucks and equipment. Arts & culture were supported through grants to the Performing Arts Center and San Angelo Ballet as they transition to their new facility. Esperanza Health & Dental Centers and the Ballinger Hospital were provided capital funds to improve and increase health services. Youth and child development grants were also awarded this past year.



The Foundation, established in 1995 with \$44 million, has awarded over \$47 million in grant funding and now has a net worth of over \$54 million thanks to prudent financial management by the volunteer board of Trustees. Looking to the future, the board will continue to identify gaps in services, new projects, capacity building initiatives and community efforts to improve the quality of life in the Concho Valley.

A handwritten signature in black ink that reads "Mike Boyd".

Mike Boyd, Chair
Board of Trustees



The best way to find yourself
is to lose yourself in the
service of others. -*Ghandi*

Trustees and Staff - 2016

Officers

Mike Boyd, Chair
Hon. Marilyn Aboussie, Vice Chair
David Lupton, Treasurer
Mary Jane Steadman, Secretary

Trustees

Devin Bates
Steve Cecil
Jim Cummings
Sande Vincent Harrison
T. Richey Oliver
Robert S. Patyrak, M.D.
Joanne Rice
Carlos Rodriguez
H. L. Stone III
Joe B. Wilkinson, M.D.

Advisory Trustees

George Alexander
O. Sterling Gillis III, M.D.
John Mark McLaughlin
Karen Pfluger
F. L. "Steve" Stephens

Staff

Tom Early, President
Deborah Watson, Vice President of Operations

Grant Activity 2016

Recipient and Purpose	Commitments 2016	Payments 2016	Future payments
Alcohol & Drug Abuse Council for the Concho Valley <i>Construction of a detox center</i>	\$0	\$250,000	\$750,000
Angelo State University <i>Funds to become a VISTA Intermediary</i>	\$126,235	\$61,741	\$64,494
Arc of San Angelo <i>Operating funds</i>	\$0	\$25,000	\$0
Association of Asian American Women <i>Program expansion</i>	\$5,000	\$5,000	\$0
Ballet San Angelo <i>Purchase furniture, fixtures and equipment for new facility at the Performing Arts Center</i>	\$33,873	\$33,873	\$0
Ballinger Memorial Hospital District <i>Upgrade Radiology Equipment</i>	\$181,557	\$181,557	\$0
Christoval Volunteer Fire Department <i>Purchase a wildfire truck/cab chassis.</i>	\$55,000	\$55,000	\$0
Concho Christmas Celebration <i>Install two permanent electrical power pedestals and fabricate twenty new poinsetta flowers</i>	\$17,493	\$17,493	\$0
Concho Valley Regional Food Bank <i>Construction of a new building</i>	\$0	\$0	\$300,000
Cornerstone Christian School <i>New HVAC in gym</i>	\$18,950	\$18,950	\$0
Eldorado Youth Corps, Inc. <i>Renovation to interior and exterior to establish Soup Kitchen and Senior Meals Program</i>	\$80,767	\$80,767	\$0
Eola Volunteer Fire Department <i>Funds for a new metal fire house</i>	\$90,000	\$0	\$90,000
Esperanza Health and Dental Centers <i>Purchase a phone system, create a call center and facility renovations.</i>	\$88,222	\$0	\$88,222



Grant Activity 2016

Recipient and Purpose	Commitments 2016	Payments 2016	Future payments
Grape Creek Volunteer Fire Department <i>Funds for a new brush fire truck</i>	\$105,122	\$105,122	\$0



House of Faith <i>Team Step Forward Scholarship program</i>	\$0	\$41,952	\$143,860
Institute for Cognitive Development, Inc. (ICD) <i>Operating Funds</i>	\$0	\$70,000	\$35,000
The Junior League of San Angelo <i>Funds for the "Student Closet" Clothing Program</i>	\$2,500	\$2,500	\$0
MHMR of the Concho Valley <i>Funds to initiate the Autism Behavioral Center</i>	\$0	\$85,750	\$0
Philanthropy Southwest <i>Sustaining Partnership</i>	\$25,000	\$0	\$25,000



Grant Activity 2016

Recipient and Purpose	Commitments 2016	Payments 2016	Future payments
Project Janus <i>Research and resource books for Direct Support Professionals for IDD/MI</i>	\$0	\$37,300	\$0
Restoring Bronte Foundation <i>Restore the community park in Bronte, TX</i>	\$62,350	\$0	\$62,350
San Angelo Area Foundation <i>San Angelo Gives amplification fund</i>	\$50,000	\$25,000	\$25,000
San Angelo Lions Charities Inc <i>Purchase outdoor therapy cycles</i>	\$26,000	\$0	\$26,000
San Angelo Performing Arts Coalition <i>Purchase Furniture, fixtures & equipment for the performing arts center</i>	\$338,000	\$200,000	\$138,000
Seasonal Assistance <i>For local non-profits</i>	\$28,000	\$28,000	\$0
Wesley Trinity Daily Bread Program <i>Purchase an additional walk-in freezer.</i>	\$19,909	\$19,909	\$0



Grant Activity 2016

Recipient and Purpose	Commitments 2016	Payments 2016	Future payments
West Texas Boys Ranch <i>Operating funds for the Sonrisas Trails Therapeutic Riding Program</i>	\$0	\$40,000	\$40,000
West Texas Boys Ranch <i>Funds to upgrade phone system and wireless internet</i>	\$33,849	\$33,849	\$0



West Texas Counseling & Guidance <i>Construction of a Counseling Facility</i>	\$0	\$425,000	\$75,000
West Texas Counseling & Guidance <i>Suicide Prevention Program</i>	\$55,460	\$55,460	\$0
West Texas Rehab Center <i>Equipment for the Pacesetters Program, Audiology Department and Orthotics/Prosthetics Department</i>	\$0	\$99,750	\$0
Young Life San Angelo <i>Young Lives ministry to teen mothers</i>	\$0	\$20,000	\$0
Young Life San Angelo <i>Renovations to Rust Street Ministries facility to relocate their agency</i>	\$0	\$285,000	\$0

Initiatives

In twenty one years the Foundation has kept a steady eye on our community. Over the years we have sought to bring useful ideas to fruition in initiatives. These initiatives include the establishment of a community foundation, Kids Kingdom Park, a scholarship program through House of Faith Ministries and the construction of the Visitor Center.

Team Step Forward

The Team Step Forward scholarship program is administered by House of Faith. The goal of the scholarship program is to identify participants of House of Faith in the middle school years and to guide them towards a post-secondary education. These students will receive financial assistance and valuable resources to help them obtain an advanced degree.

Seminars

Periodically the Foundation provides seminars of interest to the not for profit, accounting and legal communities. The most recent educational seminar was on cyber security co-sponsored by the San Angelo Area Foundation. Some past seminar topics include the newly revised Form 990 tax return for public charities and fraud prevention.

Kids Kingdom

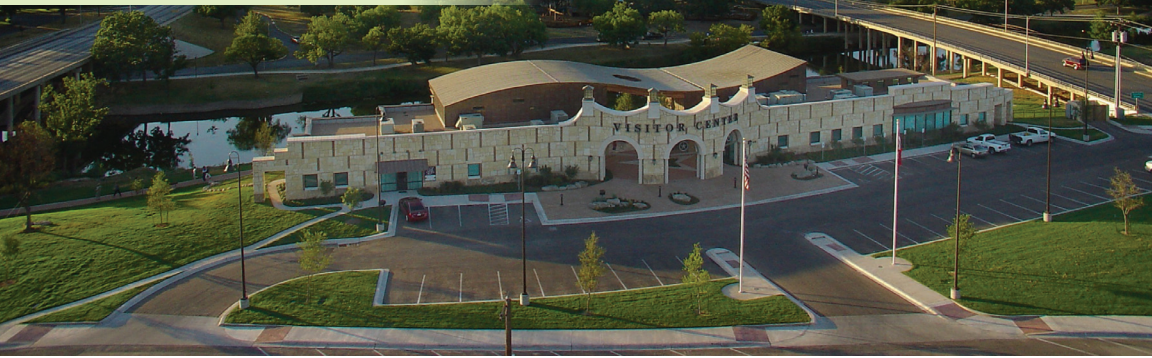


- Build date 2001
- Partnership with City of San Angelo and Junior League of San Angelo
- Includes pavilion and restrooms

Initiatives

Visitor Center

- 10,762 Visitors in 2016
- Meeting rooms available upon request
- Home to the Chamber and San Angelo Health Foundation



The San Angelo Area Foundation is a community foundation established in 2002 by the Health Foundation. The mission of the Area Foundation is to build a legacy of philanthropy by attracting and prudently managing endowed gifts in order to match donor interests with community needs.



Success Stories

Ballinger Memorial Hospital District

One of the challenges of rural health care is the continuing operations of smaller hospitals and clinics. Our most recent grant has enabled this hospital to purchase a digital X-Ray machine, a new CT unit and an upgrade to their portable X-Ray machine to digital. The Radiology Department performs on average 2,100 radiology services annually. The new digital capability will speed up patient treatment, lower any radiation exposure and allow them to offer testing not previously available.



Eldorado Service Center

With the decrease of oil services comes a decrease in surrounding counties' budgets. A group of volunteers in Eldorado were aware of

a service to be shut down in Schleicher County and they took action to not only save the service but to expand it and improve it. Thus the Eldorado Service Center was born. The center has incorporated the senior meals program and has created a soup kitchen where anyone who needs a warm meal is welcome. The newly remodeled kitchen is staffed primarily by volunteers.



Success Stories

The new program in Eldorado is called the Daily Bread Kitchen and the senior meals program is the Daily Bread Senior Meals Program.

West Texas Counseling & Guidance Center

The Counseling Center organized a new outreach program - the LOSS Team of Tom Green County. LOSS is the acronym for Local Outreach to Suicide Survivors. The LOSS Team is comprised of trained survivors of suicide who partner with mental health professionals who go to scenes of suicides to provide information about resources and are the instillation of hope for the newly bereaved. LOSS Team's goal is to follow-up with the new survivors either at the scene of the suicide or within seven days of the loss. The goal is to make bereaved persons aware of the SOS (Survivors of Suicide) support group.



Statement of Financial Position

as of December 31, 2016
(unaudited)

ASSETS

Cash and cash equivalents	\$ 264,034
Investments, at market	51,356,550
Land, buildings, equipment & other assets	4,614,418
TOTAL ASSETS	\$ 56,235,002

LIABILITIES and NET ASSETS

Liabilities

Grants payable	\$ 1,679,576
Accounts payable	80,919
Total Liabilities	\$ 1,760,495

Net Assets - Unrestricted	\$ 54,474,507
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Total Net Assets	\$ 54,474,507
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TOTAL LIABILITIES and NET ASSETS	\$ 56,235,002
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Grants totaling \$152,350 are approved but not accrued in the above Statement of Financial Position because they are conditioned on the occurrence of future events.





Statement of Activities

for the year ended December 31, 2016

UNRESTRICTED REVENUE AND SUPPORT

Interest and dividends	\$ 41,811
Realized investment gain	568,904
Unrealized investment gain	2,256,796
Royalty income	38,629
Passthrough investment income	1,244,037
Changed in accrued income	7,348
Other income	1,992

TOTAL UNRESTRICTED REVENUE and SUPPORT	\$ 4,159,517
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UNRESTRICTED EXPENSES

Investment fees	\$ 277,788
Program, depreciation and administrative costs	522,676
Total Expenses	\$ 800,464

INCREASE IN NET ASSETS BEFORE GRANTS	\$ 3,359,053
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Grants accrued during 2016	2,344,866
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INCREASE IN NET ASSETS	\$ 1,014,187
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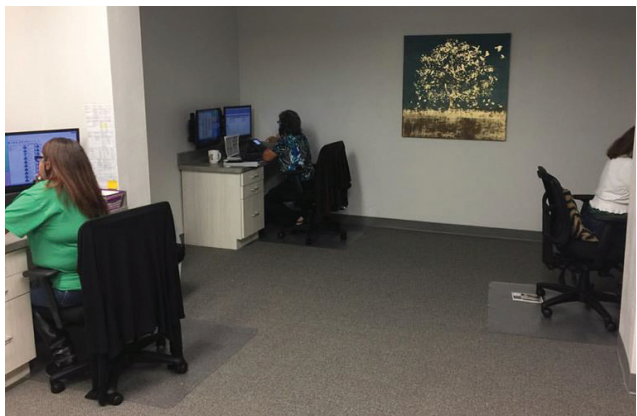
Giving Back to Your Community

We are often asked if it is possible to financially support the San Angelo Health Foundation. The answer is yes. Tax deductions up to 30% of adjusted gross income (AGI) are available for cash and ordinary income property and 20% of AGI for capital gain property. Examples of charitable contributions that you may want to consider:

- cash
- appreciated stock
- estates, wills and bequests
- charitable trusts
- life insurance

We would be glad to visit with you to discuss your charitable desires and corresponding opportunities. We also recommend consulting with your attorney and financial advisor where appropriate.

San Angelo Health Foundation, created from the proceeds from the sale of Angelo Community Hospital in 1995, became the recipient of the assets of the Myrtle Williams' estate. Consistent with her wishes, funds from the Myrtle Williams Estate have been granted by San Angelo Health Foundation to benefit health-care facilities in the San Angelo area. Grant commitments over \$5 million have been made possible through the generous gift of Myrtle Williams in honor of her parents, William Harden Williams and Mary Eveline Holmes Williams. The legacy of Miss Myrtle Williams continues and so do the benefits of her generosity and foresight to increase the quality and breadth of health care for the citizens of the San Angelo area.





Grant Application Information

Applicant organizations must have an exemption from the Internal Revenue Service indicating that it is an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and is treated as other than a private foundation within the meaning of Section 509(a) of the code. Public institutions may also qualify if the grant requested is to be used exclusively for public purposes.

Organizations meeting the above guidelines may submit grant proposals that address an identifiable current need, demand or problem in the community that is defined and documented by the applicant organization. Applications are accepted on a continuing basis.

Information detailing the procedures for grant applications and distribution of funds is available at www.sahfoundation.org or by contacting:

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Special Thanks

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Printing by Company Printing