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2017

Annual Report



Letter from the Chairman

Welcome to the San Angelo Health Foundation's 2017 Annual Report. The mission of the Foundation is "to enhance the quality of life for the people of the San Angelo area". Since inception the Foundation has awarded nearly \$50 million to 204 organizations and 680 worthy projects. A healthy San Angelo is a community with a wide range of cultural, educational, health care, transportation, housing and public services. Access and affordability of services provides all citizens an opportunity to achieve their highest level of independence and contribution to the community. San Angelo is a vibrant community that is rich in nonprofit organizations that assist us in reaching our mission.



We granted \$2 million to 34 deserving projects in 2017. Funded program areas include arts and humanities, human services, youth development, education, public safety, housing and health care. Some highlights include:

- The first Texas Mission of Mercy event in San Angelo - an event offering free dental services performed by volunteer dentists
- Galilee Community Development Center's Jeremiah Project - offering transitional housing to those on the brink of homelessness
- West Texas Counseling & Guidance – recruiting and retaining qualified staff to address the increasing mental health needs of our community
- Howard College – Creating a construction trades program to combat an increasing need for tradesmen
- Angelo State University – a brand new state of the art 3D Anatomy lab located in the newly constructed College of Health and Human Services for students in the health sciences

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. The future of the Foundation is optimistic!

In closing, I would like to express my thanks and gratitude to the Foundation Trustees. The last four years have been swift and very productive. Thank you, Trustees, for your time and dedication to the Foundation.

A handwritten signature in black ink that reads "Mike Boyd". The signature is written in a cursive, flowing style.

Mike Boyd, Chair
San Angelo Health Foundation

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.

Trustees and Staff - 2017

Officers

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

Trustees

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Steve Cecil
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Joanne Rice
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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

Success Story...

Texas Mission of Mercy Event

The first San Angelo Texas Mission of Mercy was a very successful event for the Texas Dental Association Smiles Foundation. The two day event entailed hundreds of volunteers performing free dental services. This event treated 518 patients and provided over \$484,000 of free dental services.



Patients began lining up at five in the morning to participate. The event was completely staffed by volunteer dentists, hygienists, dental students and other volunteers. The volunteers were tasked with setting up all the mobile dental equipment provided by the Texas Dental Association Smiles Foundation. The volunteers also raised awareness of the event, prescreened patients and assisted in any capacity needed.



Grant Activity 2017

Recipient and Purpose	Commitments 2017	Payments 2017	Future payments
Alcohol & Drug Abuse Council for the Concho Valley <i>Funds for construction of a treatment center</i>	\$0	\$350,000	\$400,000
Angelo State University <i>Funds to create a BodyViz Anatomy lab</i>	\$92,891	\$92,891	\$0
Angelo State University <i>Funds to become a VISTA Intermediary</i>	\$0	\$64,494	\$0
Concho Valley Regional Food Bank <i>Funds for construction of a new building</i>	\$0	\$300,000	\$0
Concho Valley Turning Point <i>Funds to renovate group meeting space</i>	\$26,566	\$26,566	\$0
Eola Volunteer Fire Department <i>Funds to build a new firehouse</i>	\$0	\$90,000	\$0
Esperanza Health & Dental Centers <i>Funds to purchase a phone system, call center and facility renovations</i>	\$0	\$88,222	\$0
Fairview School Accelerated Education Cooperative <i>Funds to purchase infant simulators</i>	\$6,206	\$6,206	\$0
Galilee Community Development Corp <i>Funds to build transitional housing</i>	\$225,000	\$0	\$225,000
Girl Scouts of Central Texas <i>Funds to renovate the San Angelo Service Center</i>	\$22,856	\$22,856	\$0



Grant Activity 2017

Recipient and Purpose	Commitments 2017	Payments 2017	Future payments
The Haven Family Shelter of McCulloch County, Inc <i>Funds for security upgrades, renovations and furniture</i>	\$67,738	\$67,738	\$0
House of Faith <i>Team Step Forward Scholarship Program</i>	\$0	\$32,642	\$111,218
Howard College <i>Funds for a new construction trades building</i>	\$74,044	\$74,044	\$0
Institute for Cognitive Development, Inc (ICD) <i>Funds to purchase property</i>	\$64,850	\$64,850	\$0
Institute for Cognitive Development, Inc (ICD) <i>Operating funds</i>	\$0	\$35,000	\$0
MOSAIC in San Angelo <i>Funds for playground resurfacing, canopy and sensory room equipment</i>	\$129,767	\$129,767	\$0



Grant Activity 2017

Recipient and Purpose	Commitments 2017	Payments 2017	Future payments
Open Arms Rape Crisis Center & LGBT+ Services <i>Funds to purchase a building</i>	\$200,000	\$0	\$200,000
Philanthropy Southwest <i>Sustaining Partner</i>	\$0	\$25,000	\$0
Pecan Creek VFD <i>Funds to build a fire house</i>	\$90,000	\$0	\$90,000
Restoring Bronte Foundation <i>Funds to restore the community park in Bronte</i>	\$0	\$62,350	\$0
Rockport - Fulton Chamber Foundation, Inc. <i>Hurricane Harvey relief fund</i>	\$100,000	\$100,000	\$0
Rust Street Ministries <i>Funds for part time employee for the receiving dock over two years</i>	\$23,920	\$11,960	\$11,960
Salvation Army <i>Funds for beds, bed frames, kitchen equipment and two washers and dryers.</i>	\$27,868	\$27,868	\$0
San Angelo Area Foundation <i>Funds for Heritage Park Project</i>	\$50,000	\$0	\$50,000
San Angelo Area Foundation <i>Funds for the 2018 San Angelo Gives amplification fund</i>	\$25,000	\$0	\$25,000
San Angelo Area Foundation <i>Scholarship honoring Jim Cummings</i>	\$10,000	\$0	\$10,000
San Angelo Area Foundation <i>Funds for the 2017 San Angelo Gives amplification fund</i>	\$0	\$25,000	\$0
San Angelo Lions Charities Inc <i>Funds to renovate the Dunbar Library</i>	\$50,000	\$50,000	\$0
San Angelo Lions Charities Inc <i>Funds for the Cycle of Life Project</i>	\$0	\$26,000	\$0

Grant Activity 2017

Recipient and Purpose	Commitments 2017	Payments 2017	Future payments
San Angelo Museum of Fine Arts <i>Capital improvements, repairs and maintenance</i>	\$334,740	\$334,740	\$0
San Angelo Performing Arts Coalition <i>Funds to purchase fixtures, furniture and equipment</i>	\$0	\$138,000	\$0
Seasonal Assistance <i>Unsolicited seasonal assistance to eleven nonprofit organizations</i>	\$28,000	\$28,000	\$0
Schleicher County Wellness Foundation Inc <i>Funds to upgrade exercise equipment and expand programs</i>	\$75,723	\$75,723	\$0
Texas Dental Association Smiles Foundation <i>Funds to serve dental patients for free with volunteer dentists</i>	\$50,000	\$50,000	\$0
West Texas Boys Ranch <i>Funds to purchase a new 15 passenger van</i>	\$38,890	\$38,890	\$0
West Texas Boys Ranch <i>Funds for the Sonrisas Trails Program</i>	\$0	\$40,000	\$0
West Texas Counseling & Guidance <i>Funds for staff retention over two years by implementing a recruitment and retention plan</i>	\$104,976	\$52,488	\$52,488
West Texas Counseling & Guidance <i>Funds to hire a new therapist and train two current therapists to become LPC Supervisors</i>	\$46,705	\$46,705	\$0
West Texas Counseling & Guidance <i>Funds for construction of a counseling center</i>	\$0	\$75,000	\$0



Success Story...

Angelo State University

The San Angelo Health Foundation encourages our local educational institutions to improve student learning and academic achievement. Angelo State University keeps a watchful eye on areas to improve their curriculum.



One recent improvement is the addition of a 3D anatomy lab using BodyViz software. The 3D lab gives students in anatomy class realistic imagery using actual patient images. Our partnership with Angelo State University allowed us to provide the hardware to make this lab accessible to students.



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:

San Angelo Health Foundation
Post Office Box 3550, San Angelo, TX 76902-3550
325.486.0185 • FAX 325.486.1125
426 West Avenue B, San Angelo, TX 76903

Foundation staff:
Tom Early, President, tomearly@sahfoundation.org
Deborah Watson, Vice President of Operations
dwatson@sahfoundation.org

Success Story...

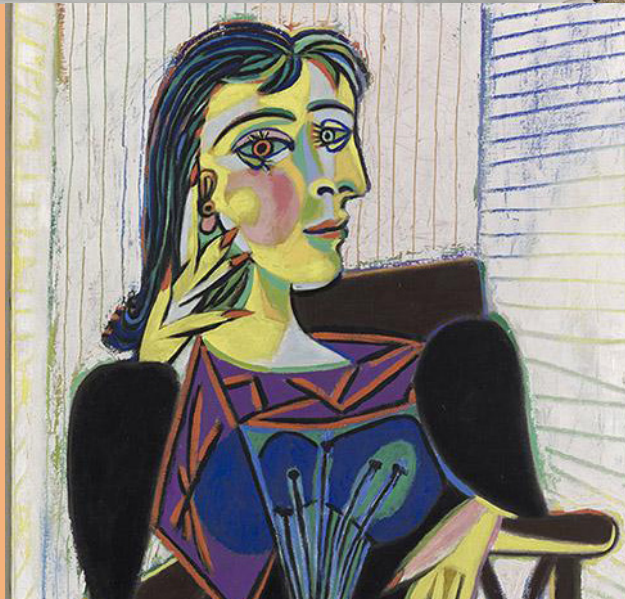
San Angelo Museum of Fine Arts

The Art Museum provides a plethora of activities for everyone. The museum invites you to awaken and sharpen your creative mind. They offer summer camps for youth, art classes for all and are open for tours. The museum invites artists from all around the world to share their visions with San Angelo.



"Art washes from the soul the dust of everyday life."

– Pablo Picasso



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.

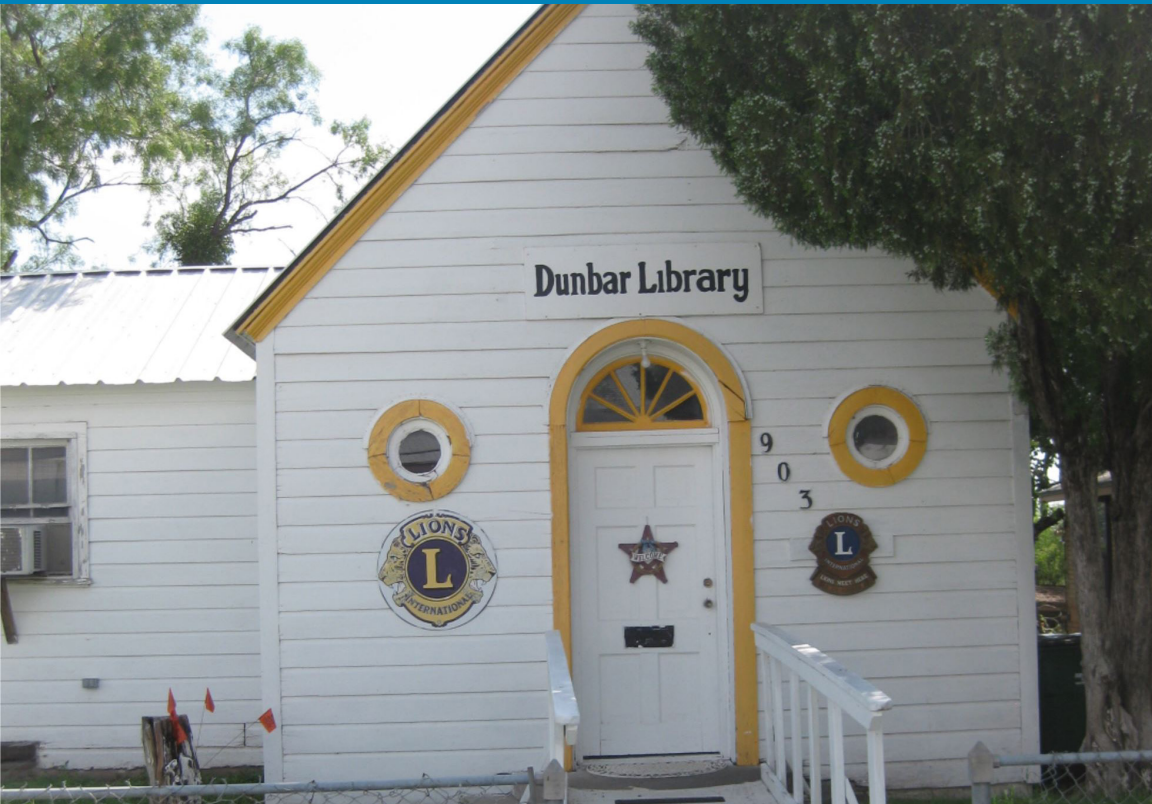
San Angelo Health Foundation, created from the proceeds from the sale of Angelo Community Hospital in 1995, became the recipient of the assets of the Myrtle Williams' estate. Consistent with her wishes, funds from the Myrtle Williams Estate have been granted by San Angelo Health Foundation to benefit healthcare 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.



Success Story...

Dunbar Library

The North by Northwest Lions club restored the Dunbar Library as a historic site. The library was built in the 1930s during the period of segregation to be used by the African American community in San Angelo. Their intent is to preserve African American literature, children's resources for a one-stop research site and create a functioning library with historical books and documents.



The restoration is complete and the newly restored library is benefitting from a Volunteer in Service to America (VISTA). The library is manned by a VISTA volunteer. The library holds some rare collections, has books available to check out and can provide special tours upon appointment.

Statement of Financial Position

as of December 31, 2017

(unaudited)

ASSETS

Cash and cash equivalents	\$ 132,737
Investments, at market	55,281,190
Land, buildings, equipment & other assets	4,213,232
TOTAL ASSETS	\$ 59,627,159

LIABILITIES and NET ASSETS

Liabilities

Grants payable	\$ 600,666
Accounts payable	90,523
Total Liabilities	\$ 691,189

Net Assets - Unrestricted \$ 58,935,970

Total Net Assets \$ 58,935,970

TOTAL LIABILITIES and NET ASSETS **\$59,627,158**

Grants totaling \$565,000 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

as of December 31, 2017

UNRESTRICTED REVENUE AND SUPPORT

Interest and dividends	\$ 327,601
Realized investment gain	2,416,987
Unrealized investment gain	3,586,543
Royalty income	50,216
Passthrough investment income	765,541
Changed in accrued income	56,823
Other income	312

TOTAL UNRESTRICTED REVENUE and SUPPORT \$ 7,204,023

UNRESTRICTED EXPENSES

Investment fees	\$ 248,709
Excise Tax	40,000
Program, depreciation and administrative costs	569,765
Total Expenses	<u>\$ 858,474</u>

INCREASE IN NET ASSETS BEFORE GRANTS \$ 6,345,549

Grants accrued during 2017 1,581,492

INCREASE IN NET ASSETS \$ 4,764,057

Initiatives...

Over the years the Foundation has 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.

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.

Team Step Forward Scholarship Program

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 guide them to an advanced degree.

Visitor Center

10,108 Visitors for 2017

Meeting Rooms available upon request

Home to the Chamber and Foundation

Kids Kingdom

Build date 2001

Partnership with City of San Angelo and Junior League of San Angelo.

Includes pavilion and restrooms.







Special Thanks

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