



The Wellmark Foundation 2007 Annual Report

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VISION

The Wellmark Foundation seeks to measurably improve the health of Iowans, South Dakotans, and their communities.

MISSION

The mission of The Wellmark Foundation is to efficiently and effectively facilitate the continual improvement of health status within Iowa and South Dakota communities by providing financial and technical assistance.

Message from Foundation Leadership

At The Wellmark Foundation, we are committed to the following values:

Community-generated solutions. Transparency and accountability. Collaborative relationships. Initiative and duty to serve areas of profound health need. Diversity of clients, grantees, and partners.

We strive to be disciplined, focused, and strategic in our efforts to make the greatest possible difference with the limited resources in our trust. Collaboration is central to our mission, as bringing our philanthropy to life can only be realized by working together with many diverse organizations. To this end, we spent the last half of 2007 in a deliberate planning process to use our philanthropy for maximum impact on the health status of Iowa and South Dakota residents. This effort required us to examine our current processes and to explore new approaches that may have stronger focus or impact. Our work included taking a retrospective look at our grant portfolio, interviewing more than 70 health and public health leaders across both states and the nation, and benchmarking ourselves versus other foundations of similar size and scope.

This annual report includes many community-based strategies that we were proud to support and numerous situations when our philanthropy served as a greatly needed catalyst in Iowa and South Dakota communities. Our recent planning process and grantee perception surveys resulted in recommendations for positive changes to our grant program, which have been incorporated into the 2008 funding process. Changes include introduction of a Letter of Interest into our application process, the opportunity to support slightly larger philanthropic commitments, and the potential for longer initial funding periods to optimize grant project work sustainability and replication.

Our future work will place an increased emphasis on childhood obesity prevention and on broad community-based wellness and prevention initiatives. We plan to shift the focus of our resources from reactive processes working to change a situation or health condition, to proactive community-based prevention and health promotion activities. The case studies highlighted in this report were funded prior to this strategic shift in philanthropic focus and were selected to illustrate a bridge between our past ideology and the new path of our philanthropy.

Although we have incorporated these changes, much remains the same. We take stewardship of our philanthropic resources seriously and work to earn and maintain your trust. Measurable outcomes, grant evaluations, and grantee self-evaluations remain at the core of our grant making process. We also continually strive for high standards of professionalism, which are reflected in all that we do.

Thank you for your time spent reviewing this report. We look forward to working with you in new and exciting ways as we collaborate to create healthy communities across Iowa and South Dakota.

Sincerely,



John D. Forsyth
Chair, The Wellmark Foundation Board of Directors



Dana W. McNeill
Executive Director, The Wellmark Foundation

ABOUT THE FOUNDATION

The Wellmark Foundation has provided more than \$12.9 million to fund 391 health-related grants in Iowa and South Dakota since 1997. The Foundation has also provided \$2.2 million to United Way organizations in both states since 1997.

The Annual Report provides summary information about The Wellmark Foundation's financials. The report also highlights details on how we use our assets to improve health status and health promotion for Iowans and South Dakotans through our grantmaking and charitable pursuits.

NURTURING



FOCUS

The Foundation provides first-dollar funds or seed money to non-profit organizations [501(c)(3)] and public/governmental entities to help local communities establish or expand projects that impact health status. Successful projects demonstrate strong community support, evidence of ongoing financial support, and significant potential for replication.

HISTORY AND FUNDING

In 1991, the Wellmark, Inc. Board of Directors appropriated \$5 million for the establishment of The Wellmark Foundation, a 501(c)(3) private foundation under 509(a) of the Internal Revenue Code. The endowment has grown through additional corpus investments from Wellmark, Inc. and portfolio earnings.

THE WELLMARK FOUNDATION STAFF

Dana McNeill, Executive Director
Matt McGarvey, M.P.A., Director
Cheryl Clarke, R.Ph., Senior Program Manager

CONTACT INFORMATION

Please contact us if you have questions, would like to discuss a project idea, or want to learn more about The Wellmark Foundation.

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CASE STUDIES

This series of examples explores the results of our funding in action. Our grant dollars mean very little until they are tied to real community projects, and the following case studies illustrate powerful efforts that bring this philanthropy to life.

The Wellmark Foundation believes that projects based in the community have the best opportunity to make a real difference in the health of individuals and their families, and to support caregivers and those coordinating their care.

REACHING



LUNCH AND LEARN



Proactive Lunch and Outreach Program Works to Prevent Diabetes Among Students in Southeast Iowa

Obesity is a serious threat to young people in today's super-sized society. Each year thousands of children struggle with overweight and obesity, both of which can result in type 2 diabetes and cardiovascular disease. Through a proactive outreach program funded by a series of Wellmark Foundation grants, Healthy Henry County Communities is teaching youth how to develop a healthy lifestyle to reduce the risk for developing these serious conditions.

Team Lunchroom: Children's Meal Ticket to Good Nutrition is a diabetes and cardiovascular disease prevention program developed by Healthy Henry County Communities (HHCC), which provides wellness and nutrition education to thousands of students in four school districts across the county.

The Wellmark Foundation has supported *Team Lunchroom* through a series of community responsive grants, including a \$35,034 grant to launch the program in 2004. *Team Lunchroom 1* worked to raise awareness of good health practices and brought nutrition to the forefront in schools, says Nancy Hahn, Healthy Communities Program Coordinator. "In the initial phase of the program we developed relationships with participating school administrators, teachers, and food service staff. This gave the districts a jump start on developing mandatory wellness policies as required by the State of Iowa Department of Education," says Hahn.

Team Lunchroom 1 also reached out to elementary students through introduction of the Pick a Better Snack Program that included bingo cards and featured different fruits and vegetables each month. "Pick A Better Snack was a very popular and effective program that promoted healthy choices and raised awareness about nutrition," adds Hahn. Ninety-one percent of students in third, fourth, and fifth grades reported trying at least one new fruit or vegetable.

According to Linda Albright, Community Health Director at Henry County Health Center, HHCC was able to expand *Team Lunchroom* to middle schools and high schools in 2005 through another Wellmark Foundation grant of \$37,720. "One of the major achievements of *Team Lunchroom 2* was that schools implemented their wellness policy guidelines in vending machines, concession stands, and school lunches, and included the information as part of their core curriculum," says Albright. Participating schools removed regular sodas and added water and flavored milk, which quickly became student favorites.

In addition, Lifestyle Challenge – Student Edition, a competition that increased students' physical activity and awareness of nutrition, was implemented in middle schools and high schools. "Nearly 60 percent of students in sixth through twelfth grades participated in the competition, which included a calendar of healthy tasks to perform each day," says Albright. The project also offered a wellness leadership and education component for local 4-H Clubs.

Additional Wellmark Foundation support in 2006 through a \$32,133 grant allowed HHCC to implement a community-wide media campaign, which included newspaper and radio components, newsletter, and HHCC Web site. *Team Lunchroom 3* also introduced mini-health fairs in the elementary schools. Hahn reports elementary students and staff continue to ask for the mini-health fairs, which presented health information in interactive and fun ways.

Team Lunchroom has been very successful in reaching young people and their parents with messages about wellness and nutrition. All four school districts in Henry County, including Mount Pleasant, New London, Winfield-Mt. Union, and WACO, participated in the project. "Team Lunchroom has reached more than 1,650 elementary students, 2,509 middle school and high



school students, and 250 kids involved in 4-H across the county,” says Albright.

Hahn believes that one key to the project’s success has been the support of administrators and staff at schools throughout the county. “Food service staff and teachers embraced the changes and were very instrumental in leading *Team Lunchroom* activities in the schools and in the classrooms.”

Ann Lehman, Food Service Director for Mount Pleasant School District has worked to incorporate *Team Lunchroom* guidelines into the district’s lunch program. “We’ve served lots of different items, including kiwi, sweet potato fries, cucumbers, spinach, and fresh tomatoes, since we started the *Team Lunchroom* project,” says Lehman. “We now offer many things that you don’t normally see on school menus. The project has done wonders to raise students’ awareness of the benefits of eating a wide variety of fruits and vegetables.”

Healthy food choices have also been incorporated into school classrooms across the county. “We’ve encouraged parents to send yogurt, cheese and crackers, peanut butter, and milk for snacks, and the children have really enjoyed the fruit and veggie tasting parties sponsored by *Team Lunchroom*,” says Chris Snyder, kindergarten teacher at Van Allen Elementary School in Mount Pleasant. “It’s been exciting to see the kids try new things that they never would have tried before.”

The Wellmark Foundation grants helped to leverage additional support for related wellness activities in the county. HHCC received mini-grants from the Iowa Department of Education’s Team Nutrition Grant Program to provide healthy snacks once a month to all elementary students in the district. The Iowa Department of Public Health’s Fit for Life grants supported recreation trail events and healthy snack samples at local grocery stores. In addition, during the implementation of *Team Lunchroom 2 and 3*, a Harkin Wellness grant provided funding for similar projects for adults in Henry County. *Team Lunchroom* and the Harkin Wellness project worked simultaneously to create community-wide excitement and synergy around wellness issues.

In an effort to continually monitor and serve the needs of its residents, HHCC will conduct a county-wide health assessment. The assessment will be supported by a \$9,800 Wellmark Foundation capacity-building grant that HHCC received in

October 2007. Partners will include Henry County Public Health, Henry County Health Center, and CD-DIAL at Iowa State University Extension.

Team Lunchroom has made a significant impact in schools, changing the nutritional environment for thousands of students in the county. The program is making a mark in the community as well. Albright says in many cases students shared the wellness information at home, which helped to change behaviors of entire families. Of the parents recently surveyed, 80 percent reported increased intake of fruits and vegetables for their family, says Albright. “This number shows that *Team Lunchroom* is making a difference in our community. We hope that students involved in the program and their family members continue to make healthy nutrition and exercise choices today and for their lifetime.”

Healthy Henry County Communities brings together many of the area’s organizations and resources to help create a better quality of life for all residents by responding to needs and opportunities as they develop in the community. The action teams, programs, and activities of HHCC are driven by the commitment of local residents to create a positive, healthy environment for everyone in the community. Through collaboration and innovation, hundreds of people in Henry County have created, sustained, and will continue to grow the Healthy Communities coalition. For more information on Team Lunchroom or Healthy Henry County Communities, contact Linda Albright at albright@hchc.org or visit www.healthyhenrycounty.org.



HEALTHY AGING



New Diabetes Prevention Program Helps North Central Iowa Seniors Grow Older in Good Health

Diabetes is a serious and widespread health condition that affects people of all ages, particularly older adults. According to the American Diabetes Association, 20.8 million children and adults in the United States have diabetes, with nearly half of this group being 60 years or older. Through support from The Wellmark Foundation, the Elderbridge Agency on Aging in Mason City, Iowa, is working to engage older adults in wellness activities to help prevent and manage type 2 diabetes.

In May 2007, The Wellmark Foundation awarded an \$8,304 mini-grant to the Elderbridge Agency on Aging to develop and pilot *Healthy Aging through Type 2 Diabetes Prevention and Maintenance: Living Better in Gowrie*. The program, which targets adults 60 years and older at the congregate meal site in Gowrie, Iowa, incorporates physical activity, nutrition, education, and lifestyle segments. *Healthy Aging* was designed to help participants prevent diabetes or self-manage their condition, and to encourage lifestyle changes for healthy aging.

Healthy Aging established a program that includes physical group exercise activities three days a week, and a diabetes and nutrition education activity one day a week. Staff presented the first 12-week session, and trained volunteers are leading an additional 24-week session. To maximize participation, sessions are offered right before congregate meals.

The grant allowed Elderbridge to identify older adults at high risk for developing diabetes in the community in order to help them prevent and manage the disease, says Tony Van Acker, M.S., Wellness Director for *Healthy Aging* and Wellness Director at Friendship Haven, a continuing care retirement community in neighboring Ft. Dodge, Iowa. "We worked to incorporate into participants' daily routine all six elements of wellness, including physical, social, emotional, mental, vocational, and spiritual."

Much of the program research has focused on the physical element of wellness, says Beth Bahnson, M.S.W., Nutrition and Development Director and Fort Dodge Office Manager of the Elderbridge Agency on Aging. All program participants received initial health screenings to create a baseline, and follow-up assessments after the first 12-week session.

According to Bahnson, the program is already showing promising results. "Follow-up health screenings revealed significant improvements in the areas of blood pressure, glucose levels, and cholesterol," says Bahnson. As a group, systolic blood pressure levels decreased by 14 percent, while diastolic blood pressure levels decreased by 11 percent. Similarly, blood glucose levels decreased by 10 percent and total cholesterol dropped by 11 percent.

Other exciting results from the program have focused around improved strength, balance, and flexibility, says Van Acker. As a group, functional reach increased by 17 percent, balance increased by 46 percent, and agility increased by 10 percent. "These improvements can help prevent falls and other injuries,

which is important to keep older adults actively participating in the community," says Van Acker.

Bahnson added, "National studies have shown that wellness training similar to *Healthy Aging* increased strength and balance, and significantly decreased the risk of falls and injuries. We hope to achieve similar long-term results through *Healthy Aging*."

Comprehensive program results will be compiled after post-program health screenings and tests are conducted, reports Bahnson. For now, it's been great to see that participants are enjoying the program and that it's working, she says. "We are thrilled for the participants about the results they've achieved, and we are excited to see the final data and additional benefits after the full 36 weeks of the program."

Van Acker reports some remarkable improvements in participants within a short amount of time, and shared one of his favorite success stories. "Four weeks into the program, one participant told the class about an exciting moment in her life. She had recently visited her child who lived in a second floor apartment. It was the first time in several years that she had been to visit due to her poor health and inability to climb the stairs. She was so excited to tell us about this accomplishment, which enriched her life."

The Elderbridge Agency on Aging plans to continue the program at the Gowrie Congregate Meal Center and has expanded the program to a site in Fort Dodge, offering wellness opportunities and activities to more seniors in the area. *Healthy Aging* will continue to help older adults create their own personal wellness success stories by encouraging them to get active, eat right, and make wise choices to help prevent type 2 diabetes and to grow older in good health.

Elderbridge Agency on Aging is a one-stop resource center for age-related information and services in north-central Iowa, serving older adults and family caregivers in a 20-county area surrounding Mason City, Iowa. Its mission is to enable older Iowans to live with the maximum dignity, well-being, and independence. Elderbridge provides information for informed decision-making and assistance in finding services. Elderbridge is a non-profit organization funded through the federal Older Americans Act and the State of Iowa General Revenue funds, and private contributions. For more information on the Elderbridge Agency on Aging or the Healthy Aging Program, visit www.elderbridge.org or contact Beth Bahnson at bbahnson@elderbridge.org.

GREAT BEGINNINGS



Innovative Health Education Program Targets Underserved Students and Families in Sioux Falls School

Elementary school is a time and place of great beginnings. It's where we learn to read, write, add, and subtract. It's where we learn to share, help each other, and work together. At Hawthorne Elementary School in Sioux Falls, South Dakota, it's also where students learn about nutrition, exercise, and making wise choices for healthy growth and development. These concepts are all integrated into Hawthorne's learning culture at school every day. Through an innovative program funded by The Wellmark Foundation, the Sioux Falls School District is working to improve the health literacy of 525 elementary school students and their families.

The *Bright Futures Health Literacy Project* was funded in April 2007 through a \$65,000 grant from The Wellmark Foundation. The project is piloting the *Bright Futures National Guidelines*, which focus on nutrition, oral health, physical activity, mental health, and safety, at Hawthorne Elementary School in Sioux Falls.

The goals of *Bright Futures* are to increase access to primary health care services in the community designed to best serve families in poverty, and to improve health communication between providers, parents, and children, says Dr. Jacqueline Kelley, D.N.P., M.P.H., Pediatric Nurse Practitioner, Supervisor of Health Services in the Sioux Falls School District. “We hope to increase family knowledge, skills, and participation in health promotion and prevention activities, increase positive health and development outcomes for children, and foster partnerships among families and local health professionals,” says Kelley.

All 525 children in Early Childhood through fifth grade at Hawthorne Elementary have participated in the project this year, and we have reached more than 25 percent of the students’ parents and family members, says Kelley. “The staff members are very dedicated, and worked hard this first year to establish trust and to get an exchange going with parents,” says Kelley. “Students, families, and staff have been very positive about the changes and new activities,” she adds.

Hawthorne Elementary School Principal Cheryl Larson believes that health is a silent partner in the development of student well-being and achievement. Good health is a basic need that creates a strong foundation for healthy growth and development, says Larson. Quality health practices also support regular school attendance, another important component of student achievement. “The *Bright Futures Health Literacy Project* is making a difference in the quality of the lives of Hawthorne’s students. Healthy learning experiences from *Bright Futures* support the school’s mission of maximizing learning potential to develop students who are capable, productive citizens with good character,” remarks Larson.

According to Kerri Cox, *Bright Futures* Program Coordinator, significant progress was made this year in the areas of nutrition, physical activity, and oral health. Simple health screenings were conducted at the beginning of the school year. Height and weight measurements were taken for all students in order to calculate their body mass index (BMI). Staff interpreted health screening

results and discussed concerns with parents at parent-teacher conferences. Seventy percent of Hawthorne families attended these sessions, says Cox. Students with BMIs of 95 percent and greater are regularly monitored for blood pressure and other health indicators, and are referred to family physicians as needed.

Cox reports that nutrition education lessons adapted from the national guidelines are presented to all classes weekly, and students in second, third, and fifth grades receive additional wellness presentations. The nutrition education sessions have greatly increased children’s awareness of the different food groups and which ones support healthy growth and development, says Cox. “We have heard many stories of children teaching their parents to make healthy choices too,” Cox adds.

Healthy snacks have also been incorporated into the school day. “We realized that many of our students needed an extra boost of nutrition each day,” says Cox. “Through support from the Midwest Dairy Council, we now provide a daily morning dairy snack, such as milk, cheese, or yogurt. It’s a wonderful supplement to help children stay strong and focused during the day.”

Keeping kids active continues to be a challenge in today’s society where screen time is so prevalent. *Bright Futures* used a combination of tactics to get children moving. A grant from the South Dakota Department of Health/Healthy South Dakota Program provided \$5,000 to fund a comprehensive walking program and incentives for students. There are several walking routes around the playground and children have the option to walk or play at recess, says Cox. “We have been pleasantly surprised by how many children participate in this activity. It’s common to see 50-60 kids walking around the playground at recess,” says Cox. “Teachers report that when children walk or run in the program at recess they are more focused on school work after recess.” Hawthorne also received two new playgrounds through the Toyota/NBA Cares Program, and new equipment and games through support from the Sioux Falls Growing Healthy Initiative.

Perhaps the most measurable and exciting results of the project thus far have occurred in the area of oral health, says Kelley. This project component has involved collaboration of many community stakeholders including Falls Community Health Center, South Dakota Dental Association, the Department of Health, Sanford, Ronald McDonald Caremobile, and Delta Dental. All 525 children

at Hawthorne received free dental education and screenings, and results were shared with parents. Three hundred children received fluoride varnish and 100 children were referred for immediate dental care. “Improved oral health can change the health status of a child in a powerful way,” says Kelley. “In some cases, a child’s dental experience at school and the clinic got their entire family going to the dentist.”

Reflecting on the first year, administrators and staff agree that *Bright Futures* is off to a promising start at Hawthorne Elementary. The Wellmark Foundation grant helped to build infrastructure of this program, allowing additional school staff to focus on health, says Kelley. This infrastructure also allowed staff to obtain numerous other funding sources to enhance programming. Kelley indicates that future plans include additional focus in the area of mental health. *Bright Futures* will also

incorporate parent workshops on wellness topics and work closely with teachers, counselors, and social workers to provide more individualized services for students and families as needed.

Cox believes the strong support of administration and staff has been very instrumental in the project’s success. “Hawthorne’s team is a group of dedicated and progressive-thinking people,” says Cox. “This is a remarkable school that is committed to helping students and families learn about nutrition, exercise, and making wise choices for healthy growth and development.”

The *Bright Futures Health Literacy Project* has been a dream come true, says Larson. “After four years of research and dreaming, it is so exciting to see health literacy alive and growing in our building through support from The Wellmark Foundation. We are truly grateful for the lives it touches now and hope to see health literacy grow into future generations.” The future for Hawthorne Elementary and its students is very bright, indeed.

Hawthorne Elementary School, a Title I school in the Sioux Falls School District is located in the historical section of the city of Sioux Falls, South Dakota. Hawthorne’s mission is to provide all students with learning activities that will maximize their learning potential in becoming proficient students who are capable, productive citizens with good character. Hawthorne is a school with a constantly changing, diverse student population. Presently 82 percent of the students are living in economically disadvantaged homes. Forty-eight percent of the students are Caucasian, and English is the second language for about 40 percent of students. Although refugee and immigrant families are not familiar with quality health care, parent surveys have shown that health literacy is important to all of Hawthorne’s families. For more information on Hawthorne Elementary contact Cheryl Larson, Principal, at (605) 367-4580. For more information on the Bright Futures Health Literacy Project, contact Dr. Jacqueline Kelley at (605) 367-7933.





SEEDS OF SUCCESS



Health Literacy Program Expands South Dakota Parents' Knowledge of Growing Healthy Eating Habits in Children

Growing healthy children in today's fast-paced, fast-food environment requires that parents have access to accurate health and nutrition information. Grants from The Wellmark Foundation are allowing the Growing Healthy Initiative in Sioux Falls, South Dakota, to increase the health literacy of parents, and ultimately, to improve the health status of children in the community.

Growing Healthy Initiative (GHI) received a \$4,988 mini-grant from The Wellmark Foundation in May 2006 to implement *Growing Healthy Babies*, a project designed to increase the health literacy of parents of infants. Overarching goals were to improve infant health and to prevent childhood obesity and subsequent diseases, such as type 2 diabetes. GHI worked with Avera McKennan Hospital, Sanford Hospital, the Women, Infants, and Children Program (WIC), and the Sioux Empire United Way to provide parents of babies in the Sioux Falls community with nutrition guides, feeding tips, and related health information.

The most popular information piece was a colorful cling designed to hang on a refrigerator or cupboard. All parents of babies born in Sioux Falls received the cling and supplemental information as part of a United Way packet when their newborn child was discharged from the hospital. Clings were also distributed at physician clinics, community centers, statewide meetings and conferences, GHI's website www.healthysiouxfalls.org, health fairs, and other community events. More than 12,000 clings were given to parents through the year-long *Growing Healthy Babies* project.

"The clings were very effective in reaching our target audience with easy-to-read and easy-to-remember nutrition information," says Denise Nelson, Growing Healthy Initiative Coordinator. "As we were distributing the clings to parents of babies at community events, we realized that parents of toddlers and pre-schoolers also needed this type of information."

In May 2007, The Wellmark Foundation awarded GHI a \$9,920 mini-grant to expand the project through *Growing Healthy Pre-Schoolers and Young Children*. The project targets parents of children ages 1-6 years through distribution of a new, tailored cling and supplemental materials. The age-appropriate nutrition information was developed with a team of local medical professionals for consistency with American Academy of Pediatrics guidelines to encourage healthy feeding of young children.

The materials will be distributed to 15,000 children currently enrolled in the 450 child care centers and pre-schools in the Sioux Falls area. The clings will also be shared at physician clinics, through WIC, and through the Sioux Falls Community School District and private schools in the community. An additional brochure, which was specially designed to educate grandparents and dispel popular myths about health and nutrition, will be available at physician clinics serving older adults and at the Center for Active Generations.

GHI has received many positive comments on the nutrition materials from parents in the community. Jodey Haag, mother and in-home child care provider, says the information helped guide her food choices for the children, and also encouraged her to make significant health changes in her own life. "I really enjoyed learning about portion sizes. It's unbelievable the difference between the amount of food we had been eating versus the amount we should be eating. We really cut back on portion sizes for our whole family."

Future plans include statewide distribution of the *Growing Healthy Pre-Schoolers and Young Children* clings to all 1,700 childcare centers and pre-schools across the state, and development of materials targeting on-the-go high school students.

In efforts to continue to expand its capacity to reach parents with timely, accurate health and wellness information, GHI also applied for a Wellmark Foundation capacity-building grant. In October 2007, GHI received a \$9,590 grant for development of a more dynamic, interactive Web site, including creation of a listserv designed to reach hundreds of parents. The enhanced Web site will allow GHI to further promote best practices in nutrition, fitness, and health through improved technology.

These three Wellmark Foundation grants are helping GHI to improve the health literacy of parents, which will ultimately shape the health of children and entire families in our community, says Nelson. "Through education we can help parents make healthy choices for their young children, follow nutrition principles to be good role models, and teach children to make healthy choices for themselves as they grow and develop. Our hope is that a healthy lifestyle is something that each family can work toward and enjoy together."

Growing Healthy Initiative is a grassroots, non-profit organization operating under the umbrella of the Sioux Falls Area Community Foundation. GHI strives to help families meet the health and wellness needs of their children, and believes that working together, the community can successfully lessen the incidence and impact of pediatric obesity, which is so prevalent in today's society. GHI works to mobilize the community to develop educational, wellness, fitness, active movement, and food choice options for children and families designed to promote a healthy lifestyle. For more information about Growing Healthy Initiative and its services, visit www.healthysiouxfalls.org or contact Denise Nelson at denisenelson_ghi@hotmail.com.

THE WELLMARK FOUNDATION 2007 FUNDING PRIORITY AREAS

The Wellmark Foundation's 2007 funding focused on improving the health of communities within the context of four funding priority areas, including depression, diabetes, end-of-life care, and health literacy.

The Foundation looks for projects that are grounded in the community, involve collaborations to address underserved populations, and recognize the role of the social determinants of health within the design of project plans. Further explanations of each 2007 funding priority area are provided on page 28.

COLLABORATING



DEPRESSION

The focus of this priority area is to improve how depression, a serious and prevalent chronic disease, is diagnosed and treated. Collaborative models designed to improve coordination and follow-up by a multi-disciplinary team can be used to improve community-based disease management of this common condition. Although longitudinal chronic care approaches to depression treatment are effective, they are not implemented as often as possible. Putting these evidence-based approaches into place requires implementing a combination of multi-level strategies while engaging patients, providers, and community organizations.



DIABETES

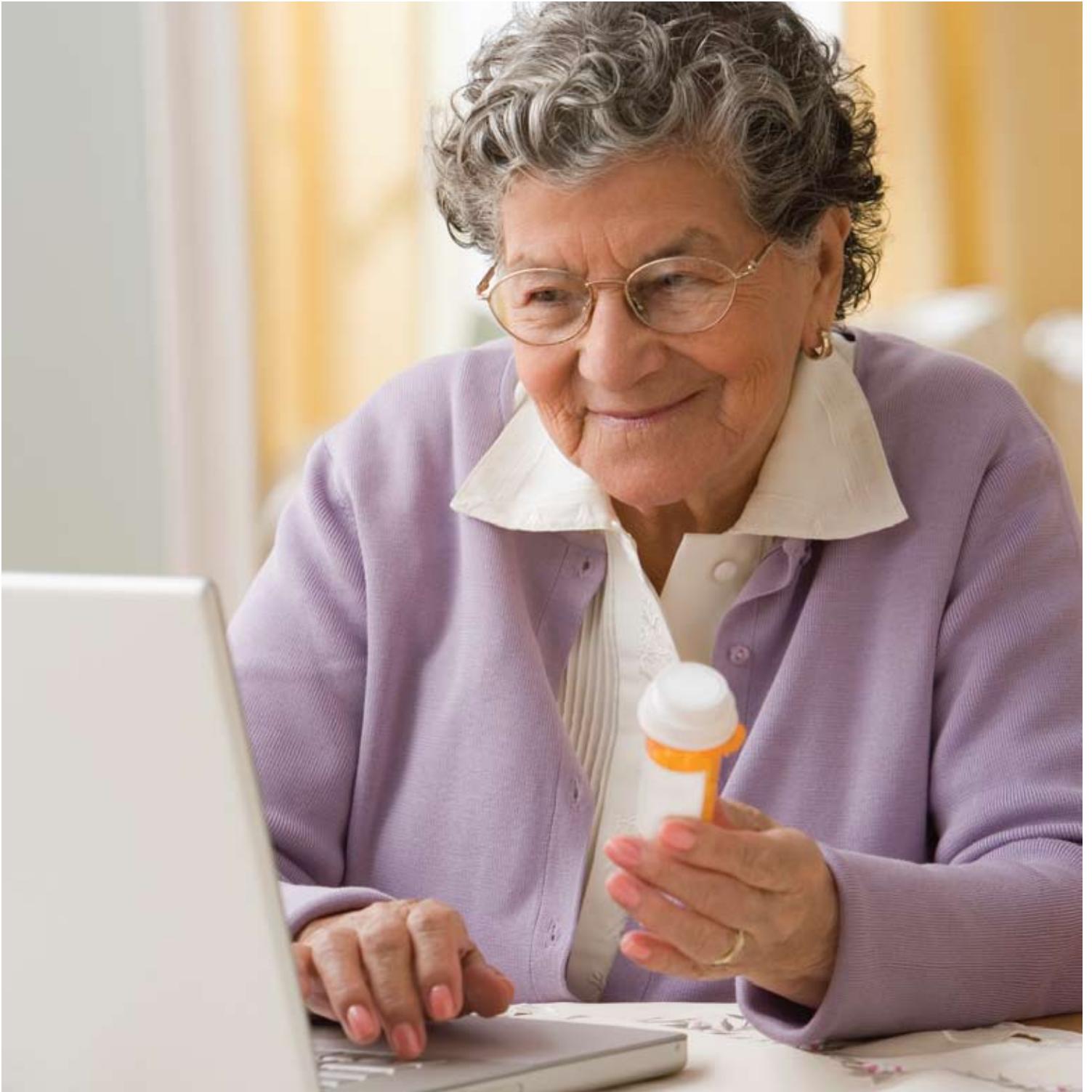
Although therapeutic measures can assist in controlling diabetes, the burden of diabetic care increasingly resides with patients and their families. Since self-management is a critical element in chronic care, our focus in this area supports patient-centered diabetes education programs. Community-based programs and links to effective community resources are recognized as important components of pre-diabetes and diabetes self-management. Our grant funding supports innovative community approaches reaching high-risk populations.

END-OF-LIFE CARE

Our grant program advances comfort, choice, and control in care at the end of life for individuals in Iowa and South Dakota. Our goal is to empower individuals, communities, public health agencies, and health care providers to help improve the quality of care that individuals and their families/caregivers receive near the end of their lives. This approach encourages people to carefully consider and make clear decisions about end-of-life care as part of an intentional planning process. Our grant funding is a starting point for initiatives that substantively contribute to the improvement of end-of-life care in our states.

HEALTH LITERACY

Our goal in this priority area is to assist distinct Iowa and South Dakota populations in addressing and improving health literacy at the community level. *Healthy People 2010* defined health literacy as the degree to which individuals have the capacity to obtain, process, and understand basic health information and services needed to make appropriate health decisions. The American Medical Association Council of Scientific America more specifically defines functional health literacy as “the ability to read and comprehend prescription bottles, appointment slips, and other essential health-related materials required to successfully function as a patient.” Our support of health literacy extends to the materials, environments, and challenges specifically associated with disease prevention and health promotion.



2007 GRANT AWARD SUMMARY

In 2007, The Wellmark Foundation made 66 grant commitments to Iowa and South Dakota non-profit and governmental organizations totaling \$2,003,258.

Brief descriptions of the projects are listed on the following pages and are arranged by state and priority area of focus. Projects include large community responsive grants, mini-grants, capacity-building grants, and dedicated grants.

GIVING



IOWA AWARDS BY PRIORITY AREA

The Wellmark Foundation funded 39 grants in Iowa totaling \$1,024,210.

DEPRESSION

- A \$26,500 community responsive grant will allow the AIDS Project of Central Iowa in Des Moines to develop a mental health and counseling program for persons living with HIV/AIDS in central Iowa. The program will strive to improve health literacy in the area of depression and help clients overcome barriers to accessing mental health services in their communities.
- Higher Plain, Inc. in West Branch will use a \$49,838 dedicated grant to strengthen its capacity to foster systemic change in how depression is understood and treated in Iowa. The organization will work with various constituency groups to implement information strategies, including redesign of the Web site, newspaper coverage, and development of brochures outlining training and assistance that Higher Plain provides.
- The National Catholic Rural Life Conference in Des Moines received a \$28,660 community responsive grant to develop a depression education program in rural central Iowa. A mini-grant from the Foundation in 2006 funded the planning process for the program, which will equip individuals to identify depression, intervene when needed, and access services in their communities.
- The Orchard Place Foundation in Des Moines will use a \$9,950 capacity-building grant to measure the effect of outpatient mental health treatment at its Child Guidance Center. The project will add capacity to the organization's treatment outcomes, effect measures, and data system by incorporating reliable measurement tools into its electronic record.
- The Sibley-Ocheyedan Community School District was awarded an \$8,580 mini-grant to implement a 12-month depression education program as part of Project HOPE (Helping Others by Preventative Education), a community-wide initiative. The program will include free educational seminars for health care and public health professionals, law

enforcement professionals, teachers, parents, students, and the general public in the district.

- The University of Iowa Foundation in Iowa City received \$88,410 in community responsive grant funds to develop a depression training program for nurses working with older adults in Iowa. The program seeks to improve the quality of life of older adults through improving the education of nurses who care for them.
- A \$66,183 community responsive grant will allow Visiting Nurse Services in Des Moines to create a postpartum depression education program for women in central Iowa. The program will be created and implemented in cooperation with four hospitals and multiple clinics located in Des Moines.

DIABETES

- Avera Health Foundation received a \$7,400 mini-grant for development of a diabetes education project. Floyd Valley Hospital, in partnership with the elementary schools in LeMars and Remsen, will develop a diabetes education and awareness program targeting children in second through fourth grade. Strategies will include classroom presentations, games, and written materials.
- The Burgess Foundation in Onawa was awarded \$8,371 in mini-grant funds to develop a diabetes education, management, and prevention project. Burgess Health will partner with local libraries to launch a public campaign and community program, including displays, resource kits, books, videos, magazines, and cookbooks.
- The Elderbridge Agency on Aging in Mason City received an \$8,304 mini-grant to develop and implement a type 2 diabetes prevention and maintenance program for older adults. The program, which incorporates physical activity, nutrition, and lifestyle education components, will be piloted at the Congregate Meal Center in Gowrie.
- Harrisdale Homestead Educational and Research Center in Atlantic received a \$10,000 mini-grant to develop a type 2 diabetes prevention awareness program targeting children in kindergarten through fifth grade. The program will be piloted in the Atlantic Community Schools and will be expanded to

all elementary schools in Cass County. Strategies will include community gardens and the development of walking school bus routes.

- The Iowa Department of Public Health was awarded a \$40,000 dedicated grant to continue development of a health care profession-based diabetes network across Iowa. This project will strengthen the Iowa Diabetes Network and help assure its sustainability by implementing communication and funding plans for continued, quality diabetes prevention in the state.
- The Iowa Health Foundation in Des Moines received a \$10,000 mini-grant for a program to reduce and prevent childhood obesity and its co-morbidities. The Center for Advocacy and Outreach at Blank Children's Hospital will develop the school-based program, which will focus on healthy lifestyle choices regarding diet, exercise, and health maintenance.
- The Iowa Natural Heritage Foundation in Des Moines received a \$6,000 mini-grant to develop a statewide diabetes and physical fitness project. The project will establish the framework for a community survey to increase physical activity on recreation trails in Iowa, and will facilitate collaboration between recreation trail developers and the health care community.
- The University of Iowa Foundation in Iowa City will use a \$9,993 capacity-building grant to implement a comprehensive data collection project in a Sudanese community in eastern Iowa. Results will be used to develop a community diabetes protocol for use with similar populations in other communities. Collaborators include the Sudanese Association, Iowa Center on Health Disparities at the University of Northern Iowa, and Neighborhood Centers of Johnson County.
- The University of Northern Iowa (UNI) Foundation in Cedar Falls will use a \$45,788 community responsive grant to pilot a diabetes education and prevention program in Black Hawk County. The program will work to improve the health-related behaviors and health status of residents with diabetes or at risk for developing the disease.

- In Keosauqua Van Buren County received a \$46,143 community responsive grant to develop a community-wide diabetes education, prevention, and support program. The program will strive to educate residents about the signs and symptoms of diabetes and to establish free health screenings.
- A \$35,300 community responsive grant will allow the YMCA of Greater Des Moines to expand a diabetes education and prevention program for children at the South Suburban YMCA. The program, which was funded in part through a previous Wellmark Foundation mini-grant, has been successful at the Riverfront YMCA and John R. Grubb YMCA in Des Moines.

END-OF-LIFE CARE

- A \$34,325 dedicated grant will allow the Iowa Hospice Organization in Des Moines to provide training to leaders of its 65 hospice members throughout the state. Training will focus on overall quality improvement and management, and quality improvement related to pain management.
- A \$5,000 capacity-building grant will allow the Pella Hospital Foundation to conduct a comprehensive feasibility study on developing a Program of All-inclusive Care for the Elderly (PACE) in a rural setting. The study will include an assessment of services currently available and services needed by the elderly and those at the end of life.
- The Siouxland Human Investment Partnership (SHIP) in Sioux City received a \$48,233 community responsive grant to develop a pediatric comfort care pilot program in northwest Iowa. The program will provide palliative care, pain management, and community support services to seriously ill children and their families.
- The Siouxland Human Investment Partnership (SHIP) in Sioux City was awarded a \$10,000 capacity-building grant to raise awareness of end-of-life issues. SHIP will work closely with Hospice of Siouxland to develop promotional strategies targeting local consumers and health care providers. Partners include Mercy Medical Center, St. Luke's Regional Medical Center, June E. Nylen Cancer Center, and local media outlets.

HEALTH LITERACY

- The Healthy Linn Care Network in Cedar Rapids received a \$33,702 community responsive grant to continue a health literacy project in Linn County. Previous grants from The Wellmark Foundation supported the Network's launch of the project in 2005 and implementation of the second phase in 2006. The third phase will develop educational strategies for specific populations challenged by health literacy issues.
- The Iowa Center of Health Disparities at the University of Northern Iowa in Cedar Falls received a \$10,000 capacity-building grant to develop a comprehensive, long-range business plan. The plan will ensure the Center's continued ability to promote health equity for diverse and underserved populations in Iowa. The Center will develop a strategic financial plan, public awareness campaign, and market survey to determine intervention priority areas.
- The Iowa Chapter of the American Academy of Pediatrics will use a \$10,000 mini-grant to begin expansion of Reach Out and Read (ROR) – Iowa to all 12 Community Health Centers in the state. ROR-Iowa serves approximately 30,000 children across the state each year. The expansion will provide books, literacy counseling, and enhanced health literacy skills to an additional 12,000 high-risk children and their families.
- The Iowa Health Foundation in Des Moines will use \$87,200 in community responsive grant funds to create a health literacy staff development guidebook for health care organizations. Various health care professionals will use the guidebook in efforts to increase the health literacy of their patients.
- The Iowa Health Foundation in Des Moines was awarded a \$10,000 capacity-building grant to conduct an evaluation of software programs to create easier-to-read health care materials. Results will help Iowa Health System select a new program to improve readability of patient and family materials.
- The Iowa Healthcare Collaborative in Des Moines received a \$50,530 community responsive grant to develop a campaign promoting improved patient and provider communications. The campaign will promote improved communications through the use of the MedCard, a folded information sheet in a billfold-sized plastic sleeve designed to help patients keep track of their medications.

- Iowa Partners: Action for Healthy Kids, Inc. was awarded a \$10,000 mini-grant to support youth who attend Youth Empowered Ambassadors for Health (YEAH!), a statewide summit that engages Iowa youth as ambassadors for school health and wellness. The funding provided 20 smaller mini-grants to participants' schools for implementation of health programs.

CAPACITY BUILDING

- The Calhoun County Board of Health in Rockwell City was awarded a \$10,000 capacity-building grant to develop a strategic plan to increase the financial management and resource development capacity of the Calhoun County Department of Health. The plan will strive to enhance the Department's relationship with the external health care environment and safeguard the community's health into the future.
- A \$10,000 capacity-building grant will allow the Community Health Center of Fort Dodge to develop a comprehensive needs assessment of Webster County. Information gathered in the assessment will be incorporated into a large federal grant proposal to support core operations and recruit health care providers. Partners include United Way, Public Health, Disability Alliance, North Central Home Care, and Upper Des Moines.
- Free Clinics of Iowa (FCI) in Des Moines received a \$100,000 challenge grant to increase the number of eligibility assessment and enrollment referrals to patient assistance programs, including *hawk-i*, Medicaid, and Medicare. The grant, which provided a one-to-one match for funds raised through grants and community support, targeted potentially eligible free-clinic patients. Wellmark Foundation support will also allow FCI to provide core operational support.
- The Great Plains Public Health Leadership Institute (GPPHLI) was awarded a \$5,000 dedicated grant to offer Wellmark Foundation grantees the opportunity to participate in its year-long leadership training program for senior and emerging leaders in health-related organizations. The grant will pay tuition costs for two representatives from grantee organizations in Iowa.
- Healthy Henry County Communities in Mount Pleasant received a \$9,800 capacity-building grant to complete a countywide survey of residents' needs and awareness of

health and social issues. The survey is part of an ongoing effort to assess the overall community health status of the county and to identify service gaps. Partners include Henry County Public Health, Henry County Health Center, and CD-DIAL at Iowa State University.

- The Iowa Department of Public Health received a \$45,000 dedicated grant to help sponsor the preeminent public health conference held in Iowa every other year. Through this grant The Wellmark Foundation continued its long-time collaboration with the Department to support The Governor's Conference on Public Health, a key health care event in the state.
- The Iowa Department of Public Health was awarded a \$10,000 capacity-building grant to establish a user group in efforts to develop a statewide data warehouse. The warehouse will build the capacity of the Department to collect, manage, and disseminate data for community health needs assessments and health improvement planning.
- A \$5,000 dedicated grant will help the Iowa Public Health Association in Des Moines to increase its capacity to submit a successful competitive grant application to the American Public Health Association/W.K. Kellogg Foundation grant program. The national program strives to increase organizational capacity by building the infrastructure of individual state affiliates.
- The North Iowa Community Action Organization in Mason City received a \$10,000 capacity-building grant to increase the capacity of 3-Ds (Data Divas and Dudes) to support area organizations. The project will create a Web-based data platform and will provide training to members of this regional technical assistance coalition. Partners include United Way of North Iowa, Mason City Youth Task Force, and Community Assessment Technical Specialists.
- The Winneshiek County Community Foundation in Decorah received a \$5,000 dedicated grant to deliver a grant-writing workshop, which is part of a series of sessions supported by The Wellmark Foundation and the Iowa Department of Public Health Office of Rural Health. The workshop will focus on budget, reporting, and regulatory issues associated with grant management.

SOUTH DAKOTA

The Wellmark Foundation funded 27 grants in South Dakota totaling \$979,048.

DEPRESSION

- The Cheyenne River Youth Project in Eagle Butte received \$10,000 in capacity-building grant funds to implement a youth mental health initiative to combat depression. Activities will include a community-wide assessment of youth needs, volunteer and staff training, development of a wellness program, and creation of a suicide crisis hotline. The initiative will increase the capacity of the project to serve the community's youth.
- The South Dakota Department of Human Services was awarded a \$53,674 dedicated grant to improve the ability of primary care providers to meet their patients' mental health care needs. This project, which will be piloted in nine community health centers in central and south central South Dakota, will strive to improve depression care provided in primary care settings.
- South Dakota Voices for Children in Sioux Falls received a \$77,250 community responsive grant to continue a statewide children's mental health initiative. The initiative was launched in 2004 to address major depression in children and Wellmark Foundation grants provided core funding for implementation of the first two phases. This third phase will educate parents and professionals who work with children about strategies to develop emotionally healthy children.

DIABETES

- A \$47,800 community responsive grant will allow Horizon Health Care, Inc. in Howard to implement a diabetes and depression awareness and treatment program for underserved patients in two rural South Dakota communities. The program will use telemedicine strategies to assist health professionals in educating and empowering patients to manage their conditions, and will link them to specialty health services for treatment.

- The Indigenous Diabetes Education Alliance (IDEA) in Rapid City received an \$8,850 mini-grant to implement a diabetes education prevention program. IDEA will conduct a series of culturally sensitive after-school seminars to educate Native American youth on the importance of nutrition, exercise, and making healthy lifestyle choices.
- The Sanford Health Foundation in Sioux Falls was awarded a \$54,162 community responsive grant to continue an outreach program to the medically underserved population in Sioux Falls. The program was originally launched in 2005 through Wellmark Foundation support. The second phase will increase underserved individuals' access to diabetes prevention and management services.
- The Sioux Falls Area Community Foundation was awarded a \$9,920 mini-grant to continue a diabetes and health literacy initiative underway in the community. The next phases will provide parents, guardians, grandparents, and child care providers with information to encourage healthy feeding of young children in South Dakota.
- The Sioux Falls Area Community Foundation was awarded a \$9,590 capacity-building grant to implement an information technology improvement project for its Growing Healthy Initiative (GHI). Through development of a more dynamic, interactive Web site, GHI will increase the number of South Dakotans who receive nutrition, fitness, and health information.
- The South Dakota Department of Health received a \$35,000 dedicated grant to increase the capacity of the South Dakota Diabetes Prevention and Control Program to compete for national funding from the Centers for Disease Control and Prevention (CDC) and to continue implementation of a statewide strategic plan for diabetes prevention and care.
- The University of South Dakota received a \$48,015 community responsive grant to implement a nutrition education project for individuals with developmental disabilities who have diabetes or are at risk for developing the disease. The project will develop nutrition education materials with appropriate readability and literacy levels to encourage individuals to make healthy lifestyle choices.

END-OF-LIFE CARE

- A \$50,334 community responsive grant will allow the Aberdeen Area Tribal Chairmen's Health Board in Rapid City to develop an education project for Native American caregivers of cancer patients. The project will provide education and training to family members, friends, and community health providers, all of whom may serve as caregivers in Native American communities.
- The Fund for Advancement of Medical Education and Research in Sioux Falls will use \$88,417 in community responsive grant funds to create a pediatric palliative care program. The program, a cooperative project of the Sanford School of Medicine and the Sanford Children's Hospital, is designed to improve the standard of care for children at the end of life.
- The National Hospice and Palliative Care Organization will use a \$30,000 dedicated grant to provide Clinical Excellence Collaborative training to South Dakota organizations providing end-of-life care. The Collaborative is a unique, nine-month program offering organizations training, resources, and support to make improvements to clinical end-of-life care.
- The Sanford School of Medicine of the University of South Dakota was awarded a \$9,750 capacity-building grant for LifeCircle South Dakota (SD) to develop a Sioux Falls-area palliative care resource directory. The tool will increase community awareness of palliative care services, programs, and funding. The directory will allow LifeCircle SD to identify service gaps and develop strategies to meet those needs.
- The University of South Dakota was awarded a \$39,000 dedicated grant to help strengthen LifeCircle SD, a statewide coalition dedicated to improving South Dakotans' care at the end of life. Strategies will positively impact public information, professional expertise, and health policy development.
- The University of South Dakota received a \$5,000 dedicated grant to support the National Hospice and Palliative Care Organization's Clinical Excellence Collaborative in South Dakota. The Collaborative provides organizations with training, resources, and support to improve clinical end-of-life care. Life Circle SD will partner with the university to provide leadership for this effort.

HEALTH LITERACY

- Black Hills State University in Spearfish received a \$62,381 community responsive grant to implement a health literacy assessment and improvement project for members of the Crow Creek Sioux Tribe. The project will improve health outcomes among tribal members with diabetes.
- The Lutheran Social Services Foundation in Sioux Falls received a \$10,000 capacity-building grant to participate in a medical interpreter training program. Staff will complete a “train-the-trainer” course offered by the Cross Cultural Health Care Program and will train fifteen interpreters to serve clients in Sioux Falls health care settings. Efforts will improve communication between refugees/immigrants and their health care providers.
- A \$67,250 community responsive grant will allow Sanford Health Foundation in Sioux Falls to create a coordinated health education curriculum for use in South Dakota schools. The curriculum will be piloted in cooperation with the Brandon Valley School District at Valley Springs Elementary School.
- The Sioux Falls School District received a \$65,000 community responsive grant to implement a health literacy education project to improve the health literacy of 525 elementary students and their families. The project, which focuses on nutrition, oral health, mental health, immunizations, and safety, will be piloted at Hawthorne Elementary School.
- The South Dakota Dental Foundation in Pierre received a \$67,200 community responsive grant to continue a statewide oral health education program for children. The program, which was launched in 2006 through a Wellmark Foundation grant, is designed to improve oral health and reduce oral health diseases in children of low-income families across the state. This phase will focus on children and parents in underserved populations.
- The South Dakota Department of Social Services received a \$45,860 dedicated grant to support the 71 active Reach Out and Read (ROR) programs throughout the state. The grant will support book purchases and help position South Dakota for a future statewide ROR coalition.

- The University of South Dakota will use a \$9,895 mini-grant to conduct a health literacy assessment among rural and underserved populations in South Dakota. Results will be presented to the South Dakota Family Physicians to improve health literacy among these South Dakota populations.

CAPACITY BUILDING

- The Great Plains Public Health Leadership Institute (GPPHLI) was awarded a \$5,000 dedicated grant to offer Wellmark Foundation grantees the opportunity to participate in its year-long leadership training program for senior and emerging leaders in health-related organizations. The grant will pay tuition costs for two representatives from grantee organizations in South Dakota.
- A \$10,000 capacity-building grant will allow the Huron Regional Medical Center Foundation to conduct a community health needs assessment. Areas of focus will include health status, community needs, and community assets. Local providers will use results to establish priorities for current and future health care services in their communities.
- The South Dakota Public Health Association received a \$49,700 dedicated grant to help sponsor the preeminent public health conference held in South Dakota every other year. Through this grant The Wellmark Foundation continued its long-time collaboration with the Association to support this important health care event. The funding will also support the Association in applying for an American Public Health Association/W.K. Kellogg Foundation grant. The national grant program strives to increase organizational capacity by building the infrastructure of individual state affiliates.
- St. Mary’s Foundation in Pierre was awarded a \$10,000 dedicated grant to further establish a Grant Writers Network for South Dakota professionals engaged in grant writing in the health, welfare, and community development areas. The project will focus on increasing resources, training, and education for grant writers across the state.

2007 CLOSED GRANT SUMMARY

The following previously approved Wellmark Foundation grants closed between January 1, 2007, and December 31, 2007.

Brief summaries of the projects are listed on the following pages and are arranged by state and priority area of focus. Projects include large community responsive grants, mini-grants, capacity-building grants, and dedicated grants. Please note that different funding priority areas were in place in previous years.

GROWING



IOWA

DEPRESSION

Higher Plain, Inc. – West Branch, Iowa
Beyond Depression Toolkits for Older Iowans
Community responsive grant – \$72,739

A statewide rural depression treatment project the organization launched in 2004 was expanded to the senior population. Higher Plain, Inc. worked with a team of experts to create geriatric depression toolkits for medical providers, the community, and older Iowans living with depression. Creation of the kits included focus group tests, extensive peer review, and expert panel review to ensure incorporation of health literacy practices. The kits are available on Higher Plain's Web site at www.higherplain.org.

National Alliance for the Mentally Ill (NAMI) of Greater Des Moines – Des Moines, Iowa

Growing NAMI Greater Des Moines
Capacity-building grant – \$4,996

NAMI improved its volunteer and information technology programs, both of which helped to expand the organization's capacity to serve the community. Seventeen new volunteers were trained to teach educational classes and support groups. The project also included development of a new Web site, e-mail newsletter, and NAMI Walks, a new project to raise funds for the organization's sustainability.

National Catholic Rural Life Conference –

Des Moines, Iowa
Iowa Rural Faith Care Connection
Mini-grant – \$4,800

Issues of depression were addressed in rural communities through community conversations, information sharing, educational initiatives, and outreach. The Interfaith Task Force helped guide this initiative, which included examining the impact of depression in rural areas, identifying barriers to care, and discussing ways for faith communities to address these. Future projects on depression in rural faith-based communities are planned.

DIABETES

Camp Hertko Hollow – Des Moines, Iowa

Diabetes 101
Mini-grant – \$5,000

The mini-grant supported delivery of Diabetes 101, an educational program that teaches caregivers, including teachers, coaches, and day care providers, to safely and effectively care for children with diabetes. The one-day program was offered at the Diabetes Education and Camping Association (DECA) conference at Camp Hertko Hollow in October 2006. A program manual was developed and distributed to the 18 conference attendees, more than 150 campers, 100 participants at a regional American Camping Association (ACA) meeting, and all of Iowa's school nurses. A second edition will also be distributed through ACA, DECA, and the Association of Camp Nurses.

Harrisdale Homestead Educational and Research Center – Atlantic, Iowa

Type 2 Diabetes Prevention Program for Fifth Grades in Atlantic
Mini-grant – \$5,000

The program educated fifth grade students, parents, and teachers about type 2 diabetes in efforts to reduce children's risk of developing the condition. The program incorporated basic health screenings, classroom nutrition projects, and special activities for all fifth grade classes in the Atlantic Community School District. The program partnered with Cass County Memorial Hospital to provide blood glucose screenings to students, parents, and teachers.

Hospital Foundation of Crawford County – Denison, Iowa

Diabetes Prevention 101
Community responsive grant – \$48,794

This project improved health outcomes for persons living in or near Crawford County who are at risk for developing diabetes. Health information was shared at a large diabetes awareness health fair and through a 13-session education program focused on diet and exercise. The health fair provided 280 people with diabetes prevention information and 84 people participated in the first education session. Thirty individuals completed lab work and were followed throughout the project. Their reductions in weight, BMI, and systolic blood pressure were statistically significant.

Iowa State University Extension – Ames, Iowa
Type 2 Diabetes in Youth: Awareness of Rural Iowa Healthcare Providers in Iowans Fit for Life Communities
Mini-grant – \$3,117

The project examined knowledge and practices of rural health providers screening youth for type 2 diabetes according to the American Diabetes Association clinical guidelines. Interviews of 11 health care providers indicated provider confusion between type 1 versus type 2 diabetes, and between adult versus youth treatment. Resources on type 2 diabetes in youth were provided to participating health care providers. Project results were shared with the Iowa Department of Public Health (IDPH), which plans to conduct similar interviews in urban settings for comparison.

Iowa/Nebraska Primary Care Association (IA/NEPCA) – Des Moines, Iowa
Center for Value in Healthcare and Diabetes Collaborative Replication
Dedicated grant – \$60,000

This funding offered infrastructure support to the IA/NEPCA Center for Value in Healthcare. The initiative gathered specific data identifying the cost effectiveness of the Iowa Community Health Center (CHC) diabetes disease management strategies used in the Wagner model chronic care collaborative. Significant improvements in diabetes control were demonstrated. Training was provided to spread the model to additional CHCs and to develop skills and expertise for future projects.

Mercy Foundation – Des Moines, Iowa
Trim Kids
Mini-grant – \$5,000

Trim Kids offered a multidisciplinary, 12-week plan for overweight children ages 6-18 years. The project was designed to give parents and children an approach to lifetime weight management, thus decreasing the likelihood of the development of diabetes. Forty-two families enrolled in the program offered at the John R. Grubb Community YMCA in Des Moines. Twenty-eight youths and their families graduated from the program, with the participants losing a combined total of nearly 100 pounds.

Mercy Medical Center Foundation – Sioux City, Iowa
Dual Challenge of Diabetes and Hypertension
Community responsive grant – \$49,143
Mercy Medical Center Foundation and a group of collaborating agencies developed new resources for individuals experiencing or at risk for developing diabetes and hypertension. Provider and patient toolkits were developed and distributed, education was provided to 23 staff from nine clinics, and 70 people attended community education forums. More than 750 patients were monitored through blood pressure monitoring programs in nine clinics, and 72 percent of patient-established goals were met. The toolkits are being used in Mercy's diabetes education program and free community blood pressure screening programs.

Wellness Council of Iowa – West Des Moines, Iowa
Modeling Wellness for Youth
Community responsive grant – \$57,769
A three-part approach established improved nutrition and increased activity in young people as a way to reduce the risk of cardiovascular disease and type 2 diabetes. Strategies included direct learning through classroom activity, modeling in a school that has embraced wellness, and creating community awareness and support. Wellness curriculum notebooks, which assisted districts in implementing nutrition and physical activity into their core subject areas, were distributed. Twenty-four students completed a challenge competition, and a parent newsletter was developed and distributed.

END-OF-LIFE CARE

Dallas County Hospital Foundation – Perry, Iowa
Hispanic End-of-Life Awareness Pilot
Mini-grant – \$4,999
This project increased awareness of end-of-life care to Hispanic individuals in the community of Perry. Community partners worked together to provide culturally competent education sessions on end-of-life care and bereavement counseling. Four new Hispanic volunteers were recruited for the hospice program. The Foundation gained valuable knowledge about working with this population, including the importance of involving children and family, as well as the church and its leaders. Partners agreed the link with the Catholic Church was critical to the pilot's success.

Iowa Hospice Organization – Des Moines, Iowa

Iowa End-of-Life Coalition

Dedicated grant – \$39,510

The Iowa Hospice Organization (IHO) led efforts to rejuvenate a statewide coalition around the four global areas of end-of-life care, including advanced care planning, out-of-hospital do not resuscitate orders, caregiver support, and pain management. The coalition built its capacity to improve the quality of end-of-life care in Iowa. Strategies included brochures, public service announcements, programs on local access cable TV, workbook, news releases, presentations for the general public and professional caregivers, and data collection on pain management in nursing homes.

Siouxland Human Investment Partnership Program –

Sioux City, Iowa

The Omaha Model: An Automated Documentation System for Interdisciplinary Care Coordination

Community responsive grant – \$65,875

Siouxland Palliative Care partnered with five primary care clinics to identify patients in need of community-based palliative care who were at-risk for frequent hospitalizations. Fifty-one individuals were enrolled in the program. Key factors indicated a need for palliative services included co-morbidities requiring in-home education, changing health status, need for medication management or community resources, and compromised caregivers. *The Omaha System* was implemented and tested. Results included decreased patient pain and suffering scores, and significantly increased quality of life scores.

HEALTH LITERACY

Healthy Linn Care Network – Cedar Rapids, Iowa

The Power of Health – Literacy Project

Community responsive grant – \$38,580

The Healthy Linn Care Network continued a project launched in 2005 to increase the health literacy and overall health of Linn County residents. The project, which is cooperatively led by the Network and the Healthy Living Coalition, provided targeted intervention to older adults while also promoting the Power of Health theme community-wide. Twenty-one individuals completed a five-session health program for older adults, and the project partnered with the Heritage Area Agency on Aging to implement a six-week chronic condition management program.

Iowa Department for the Blind – Des Moines, Iowa

Expansion of Health Literacy Resources for Iowans who are Blind or Print-Disabled

Community responsive grant – \$59,000

The Iowa Department for the Blind expanded services to Iowans who cannot read standard print by increasing the ability of the Iowa Library for the Blind and Physically Handicapped to record high quality health publications and other materials for its patrons. The Library purchased 55 in-home recording systems, which allowed in-home narrators to record up to 50 percent more materials. During the grant period the Library recorded 80 health-related items, which was a 100 percent increase. The books were circulated 93 times, and the magazines and health letters were circulated 50 times. Thirty-two volunteers have received training on the new system.

Iowa Department of Human Services – Des Moines, Iowa

hawk-i Enrollment Process Improvement Project

Dedicated grant – \$100,000

The Iowa Department of Human Services (DHS), in collaboration with the Iowa Department of Public Health's Covering Kids and Families State Coalition, conducted a study of *hawk-i* and Medicaid program applications. DHS contracted with the University of Iowa Public Policy Center to design and conduct a statistically valid study to identify and assess the underlying reasons that applicants in both programs do not successfully complete the application process. Using study results, DHS created, tested, and implemented a standardized Request for Information Letter, as well as new durable plastic Medicaid eligibility cards.

Iowa Department of Public Health – Des Moines, Iowa

Iowa Covering Kids and Families: Access Through Health Literacy

Community responsive grant – \$49,927

This project reduced the number of uninsured Iowa children through increased health literacy and reduced enrollment barriers in health care coverage programs. The project partnered with the Iowa Covering Kids and Families (CKF) State Coalition to apply principles of health literacy to existing information materials and to develop new materials for families. New materials included information on Medicaid, issue briefs, newsletter, and a high school-based health insurance curriculum in English and Spanish. Health literacy training was also provided to all CKF Coalition members.

Iowa Health Foundation – Des Moines, Iowa
Improving Health Literacy and Quality through System Change:
Rural Health Literacy Collaborative
Community responsive grant – \$87,000

The Iowa Health Foundation worked in collaboration with the Iowa Health System (IHS) rural affiliate network to establish a Rural Health Literacy Collaborative and to develop a statewide rural health literacy project. The project improved health literacy skills of health care professionals in rural communities, patient understanding of health issues, and patient-provider communications. Participants included eleven IHS rural affiliate hospitals and four organizations outside the IHS network. Participating organizations developed specific action plans to improve health literacy within their organization.

Iowa State Registry Interpreters for the Deaf – Ankeny, Iowa

Advancing the Profession of Health Care Interpreting
Capacity-building grant – \$5,000
A statewide conference, Advancing the Profession of Health Care Interpreting, was held in March 2007 at Mercy Medical Center in Des Moines. The event emphasized a public-private blend of health care interpreting delivery, policy-making, community advocacy, civil rights enforcement, research, and leadership development to improve the health care delivery to diverse populations. Attendance surpassed all goals, as 187 people attended the workshops. Topics included ethics, language specific medical vocabulary, cultural and linguistic competence, end-of-life interpreting, and more.

Mercy Foundation – Des Moines, Iowa
Improving Iowa's Medical Interpretation Services
Dedicated grant – \$43,000

Mercy Foundation expanded its medical interpreter training and cultural competency programs to areas outside of central Iowa. Activities increased the availability of professional education opportunities for bilingual interpreters and enhanced interpretation services available to non-English speaking patients at health facilities across the state. Fifty-three individuals attended basic interpreter training classes held across the state, and 94 individuals representing four languages attended advanced classes. Cultural competency resources were provided to health facilities.

CAPACITY BUILDING

Community Health Centers of Southern Iowa – Leon, Iowa

Creating Cohesion and Integration within the Decatur County Healthcare Delivery System
Capacity-building grant – \$5,000

A formal and professionally facilitated strategic planning process was implemented to encourage effective integration of medical and behavioral health services and efficient use of limited community resources. The 21 participating organizations identified multiple priorities, including increasing funding sources, maintaining referrals in the county, and developing data-sharing processes. The grant also improved relationships among participants, the Community Health Center, and the county public health office.

Free Clinics of Iowa – Des Moines, Iowa
Free Clinics of Iowa – Challenge Grant

Dedicated grant – \$100,000
This challenge grant provided a one-to-one match up to \$100,000 for funds raised through grants or financial support from the community. The challenge was met in four months through 22 donations. The support allowed Free Clinics of Iowa (FCI) to increase eligibility assessment and enrollment referrals to patient assistance programs, including *hawk-i*, Medicaid, and Medicare. A survey of current practices in these programs was conducted, barriers were identified, and improvement strategies were implemented. Training on the identified issues was provided to FCI clinic managers and additional sessions are planned.

Great Plains Public Health Leadership Institute – Omaha, Nebraska

Great Plains Public Health Leadership Institute
Dedicated grant – \$5,000

The Great Plains Public Health Leadership Institute (GPPHLI) is a year-long program designed to enhance the leadership skills of senior and emerging leaders in organizations whose primary mission is to improve the health and well-being of populations and communities. GPPHLI is a regional institute focusing on public health leadership development in Iowa, South Dakota, and Nebraska. This grant paid program tuition for two project leaders from The Wellmark Foundation's active grantees in Iowa. Participants completed the program in September 2007.

Iowa Department of Public Health – Des Moines, Iowa
Governor’s Conference on Public Health – Barn Raising VI
Dedicated grant – \$45,000

In 2007, the Foundation continued its collaboration with the Iowa Department of Public Health to provide lead sponsor support for the preeminent public health conference held in Iowa every other year. The Governor’s Conference on Public Health: Barn Raising VI was held in August 2007 at Drake University in Des Moines. More than 800 participants registered for the event, which featured keynote speaker Dr. Julie L. Gerberding, director of the Centers for Disease Control and Prevention (CDC). A total of 44 concurrent educational sessions were offered and more than 99 percent of attendees rated the conference worthwhile. Program materials are available on the conference Web site at www.thehealthconference.org.

Kirkwood Community College Foundation – Cedar Rapids, Iowa
Improving Warfarin Management in Competitive Healthcare
Dedicated grant – \$12,500
This grant, combined with a \$600,000 grant from the Agency for Healthcare Research and Quality, continued work of a project initiated in 2006 with a Wellmark Foundation grant and resulted in the establishment of the Community Anticoagulation Therapy (CAT) clinic. A software management system was developed and the Cedar Rapids Healthcare Alliance (CRHA) was created to oversee the clinic. CRHA developed a strategic plan to support ongoing work and received 501(c)3 designation from the IRS. The CAT clinic currently serves 221 patients and offers anticoagulation management workshops through Kirkwood Community College.

Primary Health Care, Inc. – Des Moines, Iowa
Service Excellence and Diversity Training for Managers and Staff
Capacity-building grant – \$5,000
Primary Health Care, Inc. continued to improve performance and accessibility through the delivery of four training modules that focused on service excellence, effective communications, and diversity. Eighty-five percent of program participants completed training evaluations, which resulted in an average of 4.5 on a 5-point scale. Project findings were incorporated into the organization’s strategic plan and performance improvement initiatives.

Proteus, Inc. – Des Moines, Iowa
Migrant Health Strategic Planning
Capacity-building grant – \$5,000
Proteus contracted with Farmworker Health Services, Inc. (FHSI) to facilitate a comprehensive migrant health strategic planning process. The planning committee, migrant health managers, and line-staff met in February 2007. The group identified goals, including expanding funding from diverse sources, improving community relations to increase farmworker health care access in Iowa, providing high quality efficient health care for the farmworker population, and recruiting and retaining competent staff. Detailed work plans supporting these goals are currently underway.

SOUTH DAKOTA

DEPRESSION
South Dakota Voices for Children – Sioux Falls, South Dakota
South Dakota Children’s Mental Health Initiative
Community responsive grant – \$70,000
This initiative improved depression care throughout South Dakota by educating professionals, including child care workers, school personnel, and health care providers. Accomplishments included development of a mental health referral schematic specific to South Dakota, an online statewide mental health resource directory, and toolkits for teaching the “Socio-emotional Foundations of Early Learning” curriculum. The coalition provided one-on-one education to 60 pediatricians and family practice doctors, and was awarded a grant for school-based mental health.

South Dakota Voices for Children – Sioux Falls, South Dakota
South Dakota Children’s Mental Health Awareness Initiative – Phase 2
Community responsive grant – \$68,900
The second phase of this initiative achieved health improvement addressing major depression in children by focusing on parents of children ages 12 years and under. *A Parent’s Guide to Children’s Mental Health Services in South Dakota* was developed and more than 15,000 copies were distributed to libraries, schools, extension offices, pediatrician and family practice offices, mental health centers, and early childhood centers. The guide received

coverage on more than 40 major television and radio stations, and 20 newspapers. An emotional wellness newsletter was distributed to more than 28,000 readers across the state.

DIABETES

Girl Scouts of the Black Hills Council –

Rapid City, South Dakota

Girl PRIDE (Positive Results in Developmental Education)

Diabetes Prevention

Community responsive grant – \$20,000

Girl PRIDE Diabetes Prevention raised awareness about the importance of a healthy lifestyle and the dangers of diabetes among underserved, at-risk girls ages 5-17 years living on the Cheyenne River, Rosebud, and Pine Ridge Indian Reservations. The program incorporated prevention, nutrition, and physical fitness education through hands-on learning activities. More than 350 girls participated in the program in 2007. Survey results indicated that 94 percent of participants learned something new about diabetes and its prevention.

Sioux Falls Area Community Foundation –

Sioux Falls, South Dakota

Growing Healthy Initiative: Growing Healthy Babies

Mini-grant – \$4,988

Growing Healthy Babies focused on improving infant health and preventing childhood obesity and subsequent diseases such as type 2 diabetes. The project provided parents in Minnehaha County with research-based, easy-to-understand nutrition guides and other health information. Refrigerator clings outlining healthy feeding information for infants were developed. More than 7,000 clings were distributed through United Way birth packets at all area hospitals. Clings continue to be distributed to parents at health fairs, health clinics, and community centers and are available on the Growing Healthy Initiative Web site at www.healthysiouxfalls.org.

South Dakota Department of Health –

Pierre, South Dakota

South Dakota Diabetes Prevention and Control Program – South Dakota Diabetes Strategic Plan

Dedicated grant – \$72,250

The South Dakota Department of Health provided leadership for development and implementation of a statewide diabetes strategic plan. Mini-grants were provided to organizations to implement strategies outlined in the plan. Organizations receiving grant support

included Communication Services for the Deaf, St. Michael's Hospital, and Sanford Watertown Clinic. Funding also supported a conference for diabetes care partners held in November 2007.

St. Mary's Foundation – Pierre, South Dakota

Regional Limb Recovery Program

Mini-grant – \$5,000

The project worked to build a model of care to reduce amputations among persons with diabetes in the communities of Fort Thompson and Rosebud. The Diabetes Limb Recovery Team met with the Tribal Diabetes Management Teams, which included 35 physicians, physician assistants, nurses, and administrative staff, to implement the Diabetes Limb Recovery Program. Brochures were created and distributed in health facilities in both communities. The project successfully implemented a more efficient process of referral and communication with tribal clinics.

Volunteers of America, Dakotas – Sioux Falls, South Dakota

Fit Factor

Community responsive grant – \$47,728

Fit Factor provided one-on-one intervention and individual fitness plan development for Sioux Falls youth ages 8-20 years at high risk for diabetes and cardiovascular disease. The health and education program focused on low-income and Native American youth at the Bowden Youth Center who presented at high risk for obesity and diabetes. Fit Factor conducted health assessments and created individual fitness plans for 110 youths. More than 90 percent of participants met their fitness goals, and 100 percent showed increases in knowledge on nutrition. More than 100 parents were reached through four community events.

END-OF-LIFE CARE

St. Mary's Foundation – Pierre, South Dakota

Reaching Out: Palliative Care

Community responsive grant – \$66,207

This community-based, comprehensive care program provided support to patients and families coping with end-of-life issues. Reaching Out offered a volunteer-based approach to meeting needs of patients and families, and educated health care providers about palliative care, hospice, and pain management. Marketing strategies included development of presentations, advertisements, brochures, multi-media campaign, free initial consultations, and establishment of the Extensive Care Program to bridge service gaps.

University of South Dakota – Vermillion, South Dakota
Partnership for Improving End-of-Life Care in South Dakota
Dedicated grant – \$45,025

The Partnership created a brand identity as LifeCircle South Dakota (SD) and strengthened its infrastructure. A statewide web of interdisciplinary, inter-organizational coalitions was created and a detailed database of more than 1,000 South Dakotans with an interest in end-of-life care was developed. More than 120 persons representing 35 communities attended a statewide conference held in 2006 in Sioux Falls. Local coalitions were created to support improvements in end-of-life care at the local level and small mini-grants were provided to support their activities.

University of South Dakota – Vermillion, South Dakota
South Dakota's Dying to Know: A Study of South Dakotans' Personal Experiences with End-of-Life Care
Community responsive grant – \$26,855

The University of South Dakota expanded Dying to Know, an ongoing study designed to improve the quality of end-of-life care and to enhance community dialogue on this issue in South Dakota. This phase of the project focused on residents' knowledge and preferences about end-of-life care by studying their personal experiences. Project findings were shared with physicians and staff at Indian Health Service, hospitals, nursing homes, assisted living centers, and hospices throughout the state. The documents are available on the LifeCircle SD Web site at www.LifeCircleSD.org.

University of South Dakota – Vermillion, South Dakota
The South Dakota End-of-Life Education Partnership
Community responsive grant – \$59,961

This community-based partnership delivered an education seminar with a focus on pain management to nurses working in nursing homes throughout South Dakota. A total of 88 individuals representing 40 long-term care facilities participated in the seminars. Participants were encouraged to serve as end-of-life advocates in their communities by providing a care education activity for staff, coordinating a review of pain management policies, and submitting a written report of activities. Evaluations revealed the seminars were successful in increasing staff knowledge.

HEALTH LITERACY

American Lung Association of South Dakota –

Sioux Falls, South Dakota
School Health Literacy Project

Mini-grant – \$5,000

The American Lung Association worked in collaboration with the South Dakota School Nurses Association and South Dakota Department of Education to implement the project, which involved statewide distribution of two health literacy tools, including a poster and clipboard identifying symptoms and emergency treatment of asthma, diabetes, and seizures. The materials were distributed to 839 schools, including all public, private, and Bureau of Indian Affairs schools in the state. Asthma training was provided to school personnel and coaches.

Mid-Central Educational Cooperative –

Platte, South Dakota

Online Health Literacy – A South Dakota Pilot Project

Community responsive grant – \$44,300

The project developed and provided a comprehensive web-based health literacy resource for students, parents, and families, and piloted an online health education course for high school students. This work is a continuation of a previous mini-grant from The Wellmark Foundation that supported grade level expectations and course scope for kindergarten through twelfth grade. The project is a collaborative effort with the South Dakota Health Adventure Web site. The site includes more than 300 lesson plans and offers a free web-based health education curriculum for all South Dakota schools.

Native American Advocacy Program for Persons with Disabilities – Winner, South Dakota

Woonspe (Learning)

Mini-grant – \$5,000

The Native American Advocacy Program (NAAP) and partners increased basic health literacy among consumers with disabilities and their families, health professionals, and other service providers. Peer support and training sessions were offered in the local tribal community. Thirty individuals with disabilities were identified as trainers to provide health literacy education to peers and health providers, with ten people completing this focused training to date. NAAP staff and consumers compiled more than 2,500 pieces of health literacy training materials and an Internet source listing for Native American persons with disabilities. Health

literacy information was incorporated into NAAP's Web site, services, and projects.

South Dakota Dental Foundation – Pierre, South Dakota
South Dakota Great Faces – Great Smiles: An Ounce of Prevention

Community responsive grant – \$61,575

South Dakota Great Faces developed a statewide oral health education and promotion program for children to increase the oral health literacy of underserved populations in the state. The project was a collaborative effort of the South Dakota Oral Health Coalition and was cooperatively led by the South Dakota Dental Foundation, the South Dakota Department of Health, and Delta Dental of South Dakota. Marketing strategies included brochures, flip charts, posters, and radio and television advertisements. All South Dakota Women, Infant, and Children (WIC) program staff and 425 Head Start staff members received training.

CAPACITY BUILDING

Avera Rural Health Institute – Sioux Falls, South Dakota
Community Assessments and Planning: The Avera St. Benedict Pilot Project

Capacity-building grant – \$5,000

Avera Rural Health Institute increased the capacity of its staff to work effectively with rural communities to conduct community health needs assessments and community health planning. Institute staff and an Avera St. Benedict community liaison received leadership training and worked with a coalition of organizations to conduct a community health needs assessment in the Avera St. Benedict area. The coalition is currently seeking grant funding to address needs identified in the assessment. Project evaluations were positive and additional communities have requested similar community assessments.

Community Healthcare Association of the Dakotas (CHAD) – Sioux Falls, South Dakota

South Dakota Health Disparities Collaborative State Summit
Dedicated grant – \$49,828

Project funding expanded the success of the National Quality of Care Health Disparities Collaborative in participating community health centers (CHCs) through a state level response and support mechanism. All centers participated in a CHC summit designed to facilitate the growth of collaborative teams, share expertise, and support each other. The CHAD Clinical

Network offered training, technical assistance, and networking opportunities to CHCs.

Great Plains Public Health Leadership Institute – Omaha, Nebraska

Great Plains Public Health Leadership Institute

Dedicated grant – \$5,000

The Great Plains Public Health Leadership Institute (GPPHLI) is a year-long program designed to enhance the leadership skills of senior and emerging leaders in organizations whose primary mission is to improve the health and well-being of populations and communities. GPPHLI is a regional institute focusing on public health leadership development in Iowa, South Dakota, and Nebraska. This grant paid program tuition for two project leaders from The Wellmark Foundation's active grantees in South Dakota. Participants completed the program in September 2007.

Institute for Educational Leadership & Evaluation – Rapid City, South Dakota

Black Hills Community Assessment

Mini-grant – \$5,000

The Institute for Educational Leadership led an effort to conduct comprehensive community needs assessments in Pennington, Meade, Lawrence, and Butte Counties in the Black Hills of South Dakota. Sixteen community partners and sponsors were involved in the project that included assessment of the prevalence of depression in each community and the resources available to meet each community's needs for mental health services. The Institute plans to repeat the survey in three to five years.

St. Mary's Foundation – Pierre, South Dakota

South Dakota Grant Writers Network Development – Phase I

Dedicated grant – \$10,000

The initiative supported development of statewide resources for individuals engaged in grant writing in the health, welfare, and community development arenas. The Grant Writers Network created a listserv for its growing membership and established a steering committee whose 16 members are geographically distributed and multi-sectored. The Second Annual South Dakota Grant Writers Network Conference was held in August 2006. More than 100 individuals from five states attended the conference.

2007 FINANCIAL REPORT

The following pages provide summary information about
The Wellmark Foundation's financial resources.

ENTRUSTING



THE WELLMARK FOUNDATION STATEMENTS OF FINANCIAL POSITION

December 31, 2007 and 2006

	December 31, 2007	December 31, 2006
ASSETS		
Cash and short-term investments	\$586,073	\$514,802
Equity investments	41,479,580	40,685,690
Receivables		
Investment receivable for securities sold	32,699	134,470
Accrued investment income	2,032	1,493
Total receivables	34,731	135,963
Total assets	\$42,100,384	\$41,336,455
LIABILITIES		
Grants payable	\$244,116	\$649,318
Payable to Wellmark	3,972	5,000
Federal excise taxes payable	83,229	123,826
Investment payable for securities purchased	862,871	860,074
Other payable	14,177	
Total liabilities	1,208,365	1,638,218
NET ASSETS		
Unrestricted net assets	40,892,019	39,698,237
Total net assets	40,892,019	39,698,237
Total liabilities and net assets	\$42,100,384	\$41,336,455

THE WELLMARK FOUNDATION STATEMENTS OF ACTIVITIES

Years Ended December 31, 2007 and 2006

	December 31, 2007	December 31, 2006
REVENUE		
Contributions from Wellmark	\$446,977	\$ 299,785
Investment income (net of expense: 2007 - \$63,767; 2006 - \$34,268)	2,660,515	1,078,861
Realized and unrealized gains on investments	155,276	2,341,774
Total unrestricted revenue	3,262,768	3,720,420
EXPENSES		
Grants	1,584,009	1,629,644
Administrative	446,977	299,785
Total expenses	2,030,986	1,929,429
Excess of revenues over expenses before federal excise taxes	1,231,782	1,790,991
Federal excise taxes	38,000	82,000
Increase in unrestricted net assets	1,193,782	1,708,991
Unrestricted net assets at beginning of year	39,698,237	37,989,246
Unrestricted net assets at end of year	\$40,892,019	\$ 39,698,237

THE WELLMARK FOUNDATION STAFF

Dana McNeill, Executive Director
Matt McGarvey, M.P.A., Director
Cheryl Clarke, R.Ph., Senior Program Manager

CONTACT INFORMATION

Please contact us if you have questions, would like to discuss a project idea, or want to learn more about The Wellmark Foundation.

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