

Empowering People. Encouraging Change.



POTTSTOWN AREA
Health & Wellness
FOUNDATION

Promoting Healthy Living

2006 Annual Report

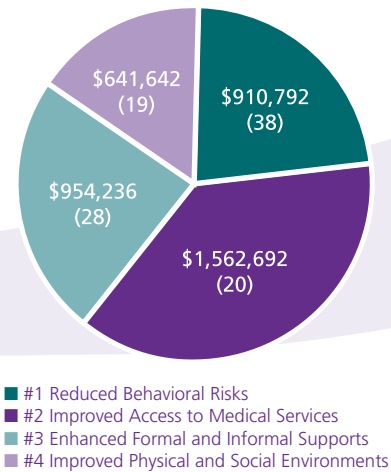
Motivating Residents to Adopt Healthy Lifestyles

Dear Tri-county Residents,

The Pottstown Area Health & Wellness Foundation has completed its second year of funding grants in the communities within our service area, and we are happy to share our progress to date.

Our first year of awarding grants started on July 1, 2004. To date, we have granted over \$4 million to the Tri-county area.

Total Grant Dollars Committed (inception to date)*
Approved by Priority—\$4,069,362
(Number of Grants—105)



*Includes \$800,000 approved in July 2006 for Pottstown Area Health Center

We were able to support this grantmaking schedule because our finance committee and our investment managers have been good stewards. Total assets were \$91,450,000 on June 30, 2006.

Although financial information may be helpful, we feel that the best measurement of our work is represented by our grantmaking efforts in the community. The following are samples of the year's accomplishments:

- **New Health Center:** This year we completed two years of behind-the-scenes support to create a new organization, a Federally Qualified Health Clinic look-a-like, now named the Pottstown Area Health Center. The Foundation announced a 15-month commitment of \$1,140,000 to provide funding to start this endeavor, focused on providing health care for working families.

We are considering additional annual grants to support this project. The Pottstown Area Health Center board has worked industriously to reach this point, and the opening of the health center is expected in 2007.

To fund the large commitments associated with the health center, the Foundation has not decreased our commitments to existing grantees but has simply increased our grantmaking budget.

- **Grantseekers Library:** We recently announced the creation of a new grants and resource library at our Foundation offices, which is available to all nonprofits in our service area. Our library includes both current books on grant opportunities, as well as advanced software. Because the research material is broad in its scope, nonprofit boards and staff are able to research grants beyond the scope of our grantmaking goals. This is provided as a public service to the entire community.
- **Institute for Nonprofit Excellence:** Last year, we joined two Chester County health conversion foundations, the Brandywine Health Foundation and the Phoenixville Community Health Foundation, in sponsoring the Institute for Nonprofit Excellence. We expect to fund this every year and feel that our investment in this learning opportunity enhances professional development for nonprofit executives and provides thoughtful resources for area nonprofit boards.

We continue our interest in funding programs on nutrition and activity in public and private schools in our region. We have now funded efforts at nine schools and expect this to increase well into the future.

In the end, whether it is through the receipt of grant dollars, through research in our grantseekers library, or through continuous improvement of nonprofit management, we hope that area nonprofit organizations can use Foundation resources to leverage additional grants to the Tri-county region. In our first fiscal year, area nonprofits were able to find an additional \$340,000 to match Foundation grants of \$1,300,000. In our second year of grant making, area nonprofits were able to leverage \$784,000 in additional grants to match Foundation grants of \$2,000,000.

In our current fiscal year, which started July 1, 2006, we have budgeted \$2,500,000 for grants and we expect within two years to be granting \$3,000,000 a year.

Plan approved

With our grantmaking ability and assets, government and legal oversight is expected. Every three years, we are required to report to the attorney general of Pennsylvania and the Orphan's Court of Montgomery County. We are pleased to report that our first three-year plan has been approved by both parties.

PMMC pension plan

We continue to have stewardship responsibilities for the pension fund that supports the current and future retirement efforts of Pottstown Memorial Medical Center (PMMC) employees through June 30, 2003. We are pleased to note that over the past year, the pension fund again earned more in income than it paid out in benefits, continuing a consistent trend over the past twenty years. As of Dec. 31, 2005, pension fund assets were \$39,613,000.

As our board and foundation professionals have listened to the community, we have fine-tuned our vision and mission statements to more closely reflect our goals and our role in the region. They are as follows:

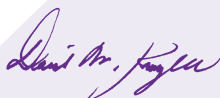
- **Revised Vision:** Area residents leading healthy lives through healthy lifestyles.
- **Revised Mission:** The Foundation enhances the health and wellness of area residents, providing education, funding and programs that motivate people to adopt healthy lifestyles.

We are motivated in our work because we know that children today, due to increased calorie consumption and decreased activity, may be the first generation to live shorter lives than their parents. However, we retain a positive outlook because seniors with increased physical activity can make noticeable health improvements well into their 80s.

The fruit of our labor is seeing people make individual choices for better health, whether it is a child at birth with the opportunity for better nutrition, a student with better lunch choices and after-school walking clubs, or a mature adult riding a bicycle into her 80s.

If you haven't already, we urge you to take those first steps toward leading a healthier life and together, with us, promote healthy living.

All the best,



David W. Kraybill
Executive Director



Charles F. Palladino
Board President

Grants Program Furthers Our Goals

The Pottstown Area Health & Wellness Foundation's cornerstone is its grants program. Every year, the Foundation distributes grants according to its four long-term goals. (See pie chart on page 2.)

Below is a list of those goals, the grant recipients and how they're using the money to benefit Pottstown area residents:

Goal 1: Reduce Behavioral Risks

Baptist Children's Service

Support social services, education and transportation costs associated with Montgomery County-based facilities.

Big Brothers Big Sisters*

Implement the Pottstown Area Kids' Club with community and school-based mentoring programs.

Boyertown Area School District

Continue district's "Healthy Hearts and Minds" initiative: junior high school exercise program, physical education computer interfacing grading program, senior high school "Goals STEALTH" program, and pregnant and parenting teen program; provide nutrition tips to parents and nutrition information on school lunches.

Daniel Boone Area School District

Expand school health program that builds an alliance of parents, teachers, child nutrition personnel, school staff and community partners to teach children and their families how to be healthy for a lifetime. Includes after-school exercise program for students and faculty, community health fair, educational materials for families, web site fitness page and seminars for teachers.

Falkner Swamp Nursery School, Inc.

Expand physical education and safety programs; enhance nutritional component. Purchase items for nutrition and safety programs and equipment for gym program; provide staff training in CPR and first-aid.

Grace Lutheran Preschool

Expand existing physical education program and add a nutritional component to the curriculum for students ages 2 to 5.

**Funding supported by Pottstown Area Health & Wellness Foundation (PAHWF) East Auxiliary*

The Growing Center, Inc.

Expand and improve facilities to accommodate handicapped participants.

Montgomery County Community Action Development Commission

Provide community nutrition information and educational courses to low-income seniors, adults, teens and children in the Pottstown community through local food cupboard network, senior center, farmers markets and summer day camps.

Owen J. Roberts School District

Continue "Fit for Life" program through the Community Wellness Fair, monthly samplings of healthy foods, health screenings, health and wellness in-services, community presentations and equipment to promote aerobic activity.

Perkiomen Valley Academy

Offer "Life Time Fitness/Responsible Health Behaviors" program, which encompasses physical fitness and healthier lifestyle choices for all school children.

Pottstown Cluster of Religious Communities

Establish a "Kids Café" program in Pottstown as part of Outreach Center's community meals program. The program provides well-balanced meals to disadvantaged children in a safe, accessible and convenient environment.

Pottstown Family Center

Continue "Color Me Healthy" nutrition and physical activity program for 3 to 6 year olds and their parents, which includes home visits, parent-child play groups and summer camp programs.

Pottstown Public Library

Purchase new health and wellness material to enhance adult programming.

Pottstown School District

Support a two-year project to form a "Safe Schools/Healthy Students" school-community partnership. District will create a comprehensive plan and submit funding proposal to federal government.

The Second Mile

Provide positive life skills and self-esteem summer camp programs for youth in the Pottstown area.

Spring-Ford Area School District

Support comprehensive health program to develop curriculum and train school staff in nutrition education; develop after-school walking clubs for elementary school students, after-school fitness programs for staff, and administrative training via conferences.

YWCA of Pottstown

Continue implementation of “Healthy Choices” program for middle school girls in Pottstown and Pottsgrove. Also support a six-week camp for at-risk youth in Pottstown held at Fellowship Farm.

Goal 2: Improve Access to Medical Services**Children’s Aid Society**

Support the “Services to Strengthen Families” program, by ensuring the safety of abused and neglected children while providing stability to the family.

Christian Concern Management and Development Corp.

Help underwrite expansion of van service for residents of Amity Manor to provide greater access to healthcare services and increase socialization and participation in the community.

The Compassionate Friends

Support families toward the positive resolution of grief following the death of a child.

Developmental Enterprises Corp.

Implement and expand the “Healthy Eating, Healthy Living Program” for Pottstown center members with developmental disabilities as well as staff, which includes bi-weekly meetings with nutritionist, food tasting sessions, exercise program and diet supervision.

Genesis Pregnancy Care Center*

Provide formula to combat hunger in newborns, which can occur between birth and mother’s first Women, Infants and Children (WIC) appointment.

Maternal and Child Health Consortium of Chester County

Provide services to “Healthy Start” prenatal and postnatal programs, and home visits to families who reside in the Pottstown area.

Partners for Family Peace*

Continue work to promote non-violent relationships and prevent family violence and child abuse through Family Peace Institutes, Family Peace Sabbath and PARCK Place programs.

Pottstown Area Health Center

Assist in funding a new medical and dental health center for those who are uninsured or underinsured and the working poor in surrounding communities.

Salvation Army

Provide eyeglass care and a limited amount of professional mental and dental healthcare for residents of the Lessig-Booth Family Residence.

Goal 3: Enhance Formal and Informal Supports

ACLAMO

Support capacity-building in areas of board and staff development, marketing, outreach and community education related to healthy family development.

Boyertown Area Multi-Service, Inc.

Establish and staff a complete food service program at senior center, which provides healthy meals to area residents along with nutritional training and instructions on food preparation for those with limited budgets.

Centro Cultural Latino Unidos, Inc.

Upgrade communications system to enable independent use of computer, telephone and fax machine to better reach and provide services to Latino community and youth.

Creative Health Services, Inc.

Establish a permanent ongoing life-skills course for intensive outpatient and mental health outpatient clients to help consumers regain or acquire self-sufficiency.

Family Service of Montgomery County— Project HEARTH

Provide support to home-bound seniors through services of in-home mental health counselor as well as experienced community volunteers.

Frederick Mennonite Community

Create a wellness resource center for retirement community residents by assessing facility and programs, recruiting a wellness director, purchasing assessment tools and providing workshops.



Left: Yoga at Boyertown YMCA.

Philadelphia Steam Fire Engine Co. No. 1

Provide new smoke detectors to all new parents of newborns at PMMC to promote use and educate families on the importance of upkeep of smoke detectors.

Pottstown Area Seniors' Center

Enhance existing "Prime Time Health" services and introduce new programs and activities; purchase or refurbish equipment and furnishings for health-related activities.

Project Outreach

Support the emergency assistance programs and food pantry supplies for Spring-Ford area residents. Provide fuel oil, rental assistance, medication cost, utility assistance, transportation, free clothing and furniture, nursing services/ health programs, children's programs and weekly food pantry.

TriCounty Community Network

Facilitate the planning and merger of the TriCounty Health Partnership and the TriCounty Interagency Consortium.

Trinity Evangelical Congregational Church

Implement "Walking There and Back Again" exercise program using pedometers; incorporate nutrition program into exercise program through the Parish Nursing Program.

United Way of Boyertown Area

Match new household area United Way contributions and provide funds to organizations that will spearhead positive and lasting changes in the community and support expansion of health and wellness services.

United Way of Western Montgomery County

Fund a targeted match to increase overall leadership giving and a matching grant to generate increased giving and new account development for 2006 campaign.

Volunteer Home Care (Diakon Lutheran Social Ministries)*

Provide volunteer home care and volunteer transportation to reach and serve more Pottstown area residents.

Women's Center of Montgomery County

Increase number of volunteers at the Pottstown center by revamping domestic violence training program to reduce

class time by using video and CD-ROM tools. Implement as a pilot in the Pottstown area.

Goal #4: Improve Physical and Social Environments

Boyertown Area Community Wellness Council

Renovate existing cinder track at Boyertown High School's Bear Stadium for school and community use.

Boyertown YMCA

Renovate current teen lounge into Youth Wellness Center for children ages 9 and older, to include a weight circuit designed for youth, a climbing wall and multiple CatEye GameBikes.

Green Valleys Association

Develop a brochure to educate the public on the connection between clean water and family health, and residents' role in keeping the drinking water supply clean.

Montgomery Early Learning Centers

Construct a playground adjacent to the Pottstown Child Care Center on Hanover Street; fund staff development pertaining to gross motor development and the role of exercise.

Pottstown Parks and Recreation Department*

Construct a safe and sanitary, multi-faceted, zero-depth spray park for children on the island area of Memorial Park.

Rails-to-Trails Conservancy

Develop community plan with area stakeholders to promote fitness in Pottstown and use of new rail-trail.

Ricketts Community Center Collaborative

Purchase new exercise equipment, paint and supplies for Clapper White weight room. Provide training materials, video equipment, and fund fitness instructor.

Royersford Outreach, Inc.

Provide resources for food pantry at Open Door center, including meat products, food and other pantry supplies, diapers and baby formula. Offsets decrease in state donation from the Community Action Development Commission.

Trilogy Park

Develop a safe, organized skate park at Memorial Park in Pottstown to provide area youth with free and accessible sports activities and encourage a healthy lifestyle.

**Funding supported by PAHWF East Auxiliary*



Left: Youth Wellness Center at Boyertown YMCA.

Grantseekers Library Offers a Wealth of Materials

The Foundation opened a resource library this year featuring books, periodicals, journals and exclusive access to key industry web sites—all organized to assist nonprofits in their grantwriting, planning, fundraising and other organizational activities.

The library provides access to web sites such as the Foundation Directory Online, Pennsylvania Nonprofit Report, Grass Roots Fundraising Journal, Nonprofit Issues, Society for Nonprofit Organizations and Nonprofit Nexus.

Books include *Foundation Center Materials*, *A Nonprofit Organization Operating Manual*, *National Directory of Corporate Giving* and *Fundraising Basics: A Complete Guide*.

Local newspapers and periodicals, such as the *Chronicle of Philanthropy*, are also available. A complete list of resource materials can be viewed at the Foundation's web site, www.pottstownfoundation.org.

The library is open to all nonprofits in the Tri-county area. Hours are 10 a.m. to 4 p.m., Tuesdays and Thursdays, or by appointment.

Service area



**FUNDS ARE TO BE USED TO
BENEFIT TRI-COUNTY RESIDENTS
FROM THE FOLLOWING ZIP CODES:**

- 18074
- 19435
- 19442
- 19457
- 19464
- 19465
- 19468
- 19470
- 19472
- 19473
- 19475
- 19492
- 19504
- 19505
- 19512
- 19518
- 19525
- 19545
- 19548

Consolidated Statements of Financial Position

June 30, 2006 and 2005

	2006	2005
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ASSETS

Cash and cash equivalents	\$180,381	\$1,287,246
Cash equivalents—restricted	3,168,524	3,061,647
Accrued interest income	222,843	152,170
Long-term investments	87,708,865	86,434,995
Equipment and furnishings—net	156,011	53,099
Other assets	13,738	14,545
Total assets	\$91,450,362	\$91,003,702

LIABILITIES

Grants payable	\$810,174	\$270,766
Accounts payable and accrued expenses	194,059	148,703
Other liabilities in connection with the sale of assets	12,457,684	15,707,621
Total liabilities	\$13,461,917	\$16,127,090

NET ASSETS

Unrestricted	\$77,988,445	\$74,876,612
Total net assets	\$77,988,445	\$74,876,612
Total liabilities and net assets	\$91,450,362	\$91,003,702

Board of directors and staff

Board of directors

Robert W. Boyce

Executive Committee Member

Teacher of Physics & Chemistry,
Malvern Preparatory School for Boys;
Captain, U.S. Navy (retired)

Mary Ann Dailey, RN, DNSc

Assistant Professor of Nursing
Kutztown University

Sharon I. Davidheiser, MD

Hospitalist, Pottstown Memorial Medical Center

D. Scott Detar, CPA

Board Treasurer

Partner, Maillie Falconiero & Co. LLP

Catherine E. Endy

Retired local business executive

P. Richard Frantz, A.I.A.

Architect

I. Michael Goonewardene, PhD, MD

Hospitalist, The Reading Hospital and Medical Center

Phyllis L. Harwood, RN, BS, CSN

Nurse, Owen J. Roberts School District
North Coventry Elementary School

Burlington B. Latshaw, III

Pastor, Emmanuel Lutheran Church

James J. Lennon, CPA

Partner, Maillie Falconiero & Co. LLP

Linda D. Lignelli, RN, BS

Retired nurse, Boyertown Area School District

Milton D. Martyny

Former President and Owner, U.S. Axle, Inc.

Robert H. Moses

Retired Administrative Vice President
National Penn Bank

**Reginald Nealy
Board Secretary**

Professor, Department of Criminal Justice
West Chester University

**Charles F. Palladino
Board President**

Director of Human Resources, Sara Lee Corporation
Household and Body Care Division – North America

Kenneth E. Picardi, Esquire

Partner, Law Offices of Yerger Daylor Allebach
Scheffey Picardi

**Sharon L. Weaver
Board Vice President**

Group Executive Vice President
National Penn Bank

Douglas N. Yocom

President and CEO
Precision Medical Products, Inc.

Staff**David W. Kraybill**

Executive Director

Rose Crews

Office Coordinator

Kate D. Moore

Program Officer

Nancy J. Mitchell

Grants Assistant

Laura E. DeFlavia, CPA

Controller

Special thanks

The Foundation would like to extend a special note of thanks to Milton D. Martyny for his three years of dedicated service as Board president. His leadership and commitment have been key components to establishing our mission of enhancing the health and wellness of area residents.

*Empowering
people.*

*Encouraging
change.*



POTTSTOWN AREA
Health & Wellness
FOUNDATION

Promoting Healthy Living

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On the cover: *Top:* Trilogy Park. *Middle (left to right):* Boyertown YMCA; Montgomery Early Learning Center; Meals on Wheels. *Bottom left:* Pottstown Summer Out of School Quality Time Program. *Bottom middle and right:* Boyertown YMCA.