Empowering People. Encouraging Change.

POTTSTOWN AREA
Health & Wellness
FOUNDATION
Promoting Healthy Living

2006 Annual Report
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)

- **$1,562,692** (20)
- **$954,236** (28)
- **$641,642** (19)
- **$910,792** (38)

- #1 Reduced Behavioral Risks
- #2 Improved Access to Medical Services
- #3 Enhanced Formal and Informal Supports
- #4 Improved Physical and Social Environments

*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.

*Funding supported by PAHWF East Auxiliary
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.
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

*Funding supported by PAHWF East Auxiliary
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*
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.


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.
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

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<tr>
<th></th>
<th>2006</th>
<th>2005</th>
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<tbody>
<tr>
<td><strong>ASSETS</strong></td>
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<td></td>
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<tr>
<td>Cash and cash equivalents</td>
<td>$180,381</td>
<td>$1,287,246</td>
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<tr>
<td>Cash equivalents–restricted</td>
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<td>3,061,647</td>
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<tr>
<td>Accrued interest income</td>
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<td>Long-term investments</td>
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<td>86,434,995</td>
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<tr>
<td>Equipment and furnishings—net</td>
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<td>Other assets</td>
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<td>14,545</td>
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<tr>
<td><strong>Total assets</strong></td>
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<td>$91,003,702</td>
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<td><strong>LIABILITIES</strong></td>
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<tr>
<td>Grants payable</td>
<td>$810,174</td>
<td>$270,766</td>
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<td>Accounts payable and accrued expenses</td>
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<td>Other liabilities in connection with the sale of assets</td>
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<td>15,707,621</td>
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<td><strong>Total liabilities</strong></td>
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<td><strong>NET ASSETS</strong></td>
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<td>Unrestricted</td>
<td>$77,988,445</td>
<td>$74,876,612</td>
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<tr>
<td><strong>Total net assets</strong></td>
<td>$77,988,445</td>
<td>$74,876,612</td>
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<tr>
<td>Total liabilities and net assets</td>
<td>$91,450,362</td>
<td>$91,003,702</td>
</tr>
</tbody>
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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, Ill
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 Yergey 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.

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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.