

**New Beginnings** | A lifetime of commitment  
to healthy living



POTTSTOWN AREA  
**Health & Wellness**  
FOUNDATION

*Promoting Healthy Living*



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POTTSTOWN AREA  
**Health & Wellness**  
FOUNDATION

*Promoting Healthy Living*

## Creating a regional identity focused on healthy living



Dear Tri-County Resident,

The Pottstown Area Health & Wellness Foundation has completed its second year of operation, and we are pleased to share our progress with the communities we serve.

Following the sale of Pottstown Memorial Medical Center to Community Health Systems in July 2003, the Foundation and its volunteer board of directors have made tremendous strides. Among our many accomplishments, we have developed a grants process and awards program that support our mission of promoting healthy living.

Because we were very fortunate in the timing of our investments, the Foundation was able to grant more than the \$1 million originally promised to our communities in fiscal 2005. At the close of our fiscal year on June 30, 2005, the Foundation had made commitments or grants exceeding \$1.3 million. Individual grants ranged from as little as \$2,000 to as much as \$100,000—all with the intent of enhancing the health and wellness of Pottstown area residents.

Beyond financial grants, the Foundation makes resources available to our communities in many other ways. For example, last year we:

- Launched an online health assessment to help area residents gauge their health. To take this simple assessment, please visit our web site at [www.pottstownfoundation.org](http://www.pottstownfoundation.org) and click on "Assess My Health."
- Funded a study and published "A Health Assessment of the Pottstown Area."
- Moved our headquarters to 152 E. High St. in Pottstown. Although the Foundation does not make grants for economic development, we are happy to contribute to the revitalization of downtown Pottstown and make the Foundation even more accessible to area residents.

- Continued to be good stewards of the communities' assets. In the past year, we have carefully invested the proceeds from the hospital's sale. As a result, the Foundation's assets have increased to \$87 million.

In addition, the Foundation continues to manage the hospital's pension fund, which benefits former and current employees. With assets of \$35 million and annual returns of 10 percent, the fund is ensuring that retirement money is readily available to employees who served the hospital so dutifully and who were on staff prior to July 1, 2003.

We would like to take a moment to thank the North and East Auxiliaries respectively for their fundraising efforts in the community and the hospital gift shop. Their generous and dedicated commitment has allowed the Foundation to increase the amount of larger grants given to the community.

Looking ahead to fiscal 2006, the Foundation is excited about advancing our mission to promote healthy living. Among our many goals, we have doubled our grant-making budget to \$2 million. Every year, our grant-making efforts move us a step closer to building a community focused on healthy living.

All of us—residents of the tri-county area, non-profits that receive grants, leaders of our respective communities—can play a significant role in creating a regional identity focused on healthy living. Whether you become more active physically or help others do so, you can contribute to the Foundation's mission.

All the best,

David W. Kraybill  
Executive Director

Milton D. Martyny  
Board President

## Serving Pottstown area residents for generations to come



Imagine ...

- ... a vibrant community.
- ... a community in which residents are physically active.
- ... a community in which people eat a healthy diet and, in turn, achieve and maintain a healthy weight.
- ... a community that avoids substance abuse.
- ... a community that strives for good emotional and spiritual health.
- ... a community that, over time, has fewer health and wellness issues.

That's our dream for the greater Pottstown area.

The Pottstown Area Health & Wellness Foundation was formed in July 2003, when Community Health Systems purchased Pottstown Memorial Medical Center. The sale generated \$81 million in assets for the Foundation.

Over the past two years, the Foundation has held its assets in invested endowments, which act like a savings account for the community. We earn interest and have capital gains on those investments, and the earnings are benefiting Pottstown area residents today—and will continue to do so for many generations to come.

Our vision and mission today are the same as they were two years ago:

*Vision: The Foundation is the leading catalyst for continuous improvement of health and wellness in the Pottstown area.*

*Mission: The Foundation exists to enhance the health and wellness of Pottstown area residents.*

## Taking Steps to Our Success

Since July 2003, the Foundation has reached several milestones on its way to promoting healthy living in the tri-county region.

In our first fiscal year, we formed a board of directors and several committees composed entirely of volunteers. Those committees included Grants and Programs, Communications, Strategic Planning, Nominating, Finance, Executive and Oversight. In addition, the Foundation hired a full-time staff of four employees, including Executive Director Dave Kraybill.

During our second fiscal year, the Foundation developed a strategic community plan, which was approved by the Orphan's Court of Montgomery County in August 2004. The plan was based on a health needs assessment of the greater Pottstown area. The Foundation funded the assessment and published its results in *The Mercury* newspaper in January 2005.

In fiscal 2005, one of our biggest accomplishments was the completion of two grants rounds. These are opportunities for non-profit organizations to apply for Foundation grants. Following the fall 2004 and spring 2005 rounds, the Foundation awarded 50 grants totaling \$1.3 million. Non-profits are using the grant money to develop and enhance programs that support the Foundation's purpose.

As we begin fiscal 2006, the Foundation is looking forward to "living out" its vision and mission in the communities we serve. Over the next several years, everyone in the tri-county region will benefit from the Foundation's initiatives, programs and grant awards.

We're here to help everyone improve their health and well-being every day. By doing so, we will create a more dynamic and vibrant community. Imagine that.

## Grants program benefits everyone



The Foundation's cornerstone is its grants program. Every year, the Foundation distributes grants according to its four long-term strategic goals (see pie chart, page 10).

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

### **Goal 1: Reduce Behavioral Risks**

#### **Boyertown Area School District (Boyertown Health & Wellness Council)**

Plan a system of walking and running facilities; expand elementary school exercise programs; expand the Pine Forge Elementary School breakfast program to other elementary schools; re-establish the high school teen-parenting program; provide new exercise and nutrition services to students, parents and staff.

#### **Creative Health Services**

Help elementary school students change behaviors that limit their learning abilities; provide drug and alcohol education; initiate a new program to assist children of all ages who have witnessed or have been victims of domestic violence.

#### **Daniel Boone Area School District**

Develop a coordinated school health program to teach children and families how to be healthy for a lifetime.

#### **Owen J. Roberts School District**

Develop a "Fit-for-Life" program to increase nutrition and exercise awareness and to integrate the importance of life-long fitness to students and the community.

#### **Pottsgrove School District**

Locate a Wellness Center in the high school, focusing on cardiovascular and strength training as well as weight and health management for students and the community.

#### **Pottstown Cluster of Religious Communities – Cluster Outreach Center**

Establish two Kids Café sites, each operating two days a week. The sites will provide about 200 meals a month and more than 2,500 meals a year to needy children.

#### **Pottstown Family Center (Family Services of Montgomery County)**

Support three parent educators in the "Color Me Healthy" nutrition program.

#### **Pottstown Public Library\***

Update current materials and add new ones on health and wellness topics, including an "Encyclopedia of Family Health". Provide "Welcome Packets" to parents of newborns at PMMC to encourage reading, nutrition, health and safety.

#### **Royersford Outreach Inc. – Open Door**

Support Open Door's nutrition and health efforts, which benefit economically disadvantaged individuals of all ages.

#### **Spring-Ford Area School District**

Develop a coordinated school health and nutrition policy; develop a curriculum for nutrition education; coordinate school food service with nutrition education; develop an after-school fitness club in each elementary school; develop after-school fitness programs for district staff; provide training and/or participation in conferences.

#### **St. Aloysius School**

Implement a "Fitness, One Step at a Time" program by providing pedometers for students, faculty and staff; provide a portable CD player for outside use to encourage brisk walking.

#### **The Growing Center**

Share the healing benefits of horticultural therapy with the community, especially the physically and mentally handicapped, senior citizens and at-risk youth.

\* Funding supported by PAHWF East Auxiliary

Above: Teaching young students healthy habits at Daniel Boone Elementary School.

## Grants program benefits everyone



**YMCA of Pottstown and Upper Perkiomen Valley**  
Develop a “Fit Kids” program, including equipment, marketing and staffing for overweight individuals under 18.

### **YWCA Pottstown – Eliminating Racism, Empowering Women\*\***

Hire a new program director to evaluate the YWCA’s existing programs and implement a new program for teenage girls, “Healthy Choices.”

## **Goal 2: Improve Access to Medical Services**

### **ACLAMO**

Revitalize the Pottstown center through new resources and community connections; restore programs for seniors, children and youth.

### **Centro Cultural Latinos Unidos**

Educate the Latino community about HIV and AIDS prevention.

### **Family Services of Montgomery County – Project HEARTH\*\***

**(Helping Elderly Adults Remain in Their Homes)**  
Expand in-home, mental health counseling services to frail and homebound seniors; provide support services such as transportation, home improvements, errand-running and Meals on Wheels delivery.

### **Partners for Family Peace\*\***

Provide administrative support; develop a Family Peace House; find office space and a new location for PARCK Place; provide education to prevent child abuse and domestic violence.

### **TriCounty Health Partnership**

Fund a feasibility study requested by TCHP to explore the need for a health clinic in the Pottstown area.

## **Goal 3: Enhance Formal and Informal Supports**

### **Family Services – Meals on Wheels\*\***

Implement a “Weekend Meals on Wheels for Frail Seniors” enhancement to the existing program; buy freezers for “Meals on Wheels” storage and a few microwaves for clients who need them; serve meals for one year.

### **Pottstown Area Police Athletic League**

Create a strategic plan.

### **Ricketts Community Center**

Conduct a program audit; implement new programs and continue existing programs held after school and during the summer for elementary school youth.

### **The PEAK Center Inc.**

Support the Collaborative Research Project to determine how the 10 senior centers in Montgomery County can meet the future needs of aging baby boomers.

### **TriCounty Health Partnership – Healthy Community Movement\*\***

Identify root causes affecting health and healthy lifestyle choices; increase the efficiency of existing resources to positively impact causes.

### **TriCounty Interagency Consortium**

Continue improvements to the “First Call for Help” telephone referral service and the “Where to Turn” guide of regional community agencies.

### **United Way of Western Montgomery County**

Provide a challenge grant as an incentive for the fall 2004 campaign.

### **YMCA of Pottstown and Upper Perkiomen Valley, Boyertown Area YMCA**

Study the feasibility of a possible merger between the two organizations.

\*\* Funding supported by PAHWF North Auxiliary

Above: YMCA of Pottstown and Upper Perkiomen Valley’s Fit Kids Program.





## Goal 4: Improve Physical and Social Environments

### Fellowship Farm

Help finance "Building Family Strengths," a program that promotes emotional well-being and educational success to needy families in the Pottstown area.

### Frederick Mennonite Community

Create a program that rewards people for living a healthier lifestyle.

### Landfill Closure Committee

Assist the committee with gathering information about the environmental and health impacts of the Pottstown Landfill.

### Perkiomen Valley Healthy Community Partnership

Continue offering youth fitness programs and dances; create a safe, supervised recreation environment for middle school students.

### Pottstown Parks and Recreation Department

Install new American Disabilities Act-compliant playground equipment at Maple Street Park.

### Schuylkill River National and State Heritage Area/Schuylkill River Greenway Association

Construct 1.8 miles of the Thun Trail section of the Schuylkill River Trail; create trailheads at Riverfront Park and Morlatton Village; construct a river access or landing area for canoes and kayaks at Riverfront Park (to be completed spring 2006).

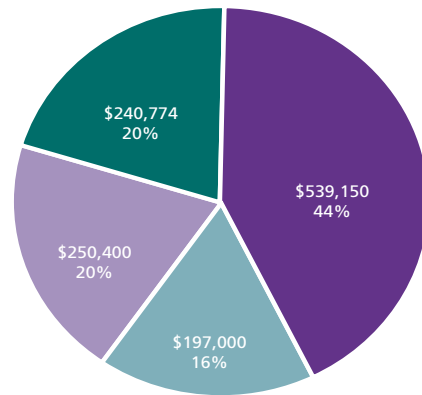
### Sherwood Park

#### (Community Development Corporation)

Implement a flag football program and introduce an adult exercise program.

### Trilogy Park Parents' Association

Provide paving for hairpin turns at the BMX bike track at the former Gruber pool in Memorial Park.

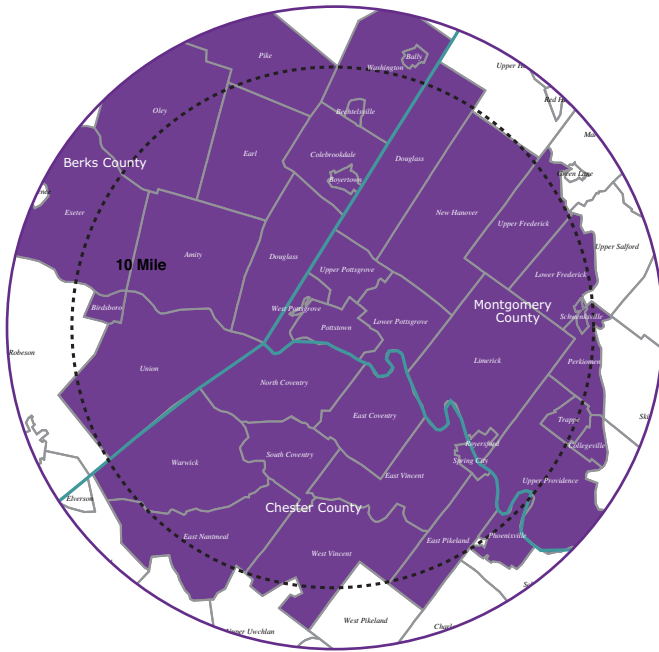


- ▲ Reduce Behavioral Risks
- ▲ Improve Access to Medical Services
- ▲ Enhance Formal and Informal Supports
- ▲ Improve Physical and Social Environments

The Foundation has doubled its grant budget to \$2 million in fiscal 2006. Non-profit organizations may apply for a grant by following this process:

- The non-profit must submit a two-page letter of intent.
- After reviewing the letter of intent, the Foundation will notify the non-profit whether or not it should proceed with a grant application.
- Non-profit submits completed grant application to Foundation.
- The Foundation will notify the non-profit whether or not it has been awarded a grant.
- The Foundation will distribute the grant money upon receipt of signed commitment letter.

For more information about the grants process and cycles, upcoming seminars and workshops, please visit the Foundation's web site: [www.pottstownfoundation.org](http://www.pottstownfoundation.org).



Funds are to be used to benefit Tri-county residents from the following zip codes:

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

**Consolidated Statements of Financial Position**  
June 30, 2005 and 2004

	2005	2004
<b>ASSETS</b>		
Cash and cash equivalents	\$1,287,246	\$3,001,860
Cash equivalents–restricted	3,061,647	3,015,770
Accrued interest income	152,170	543,092
Long-term investments	86,434,995	80,252,491
Equipment and furnishings – net	53,099	21,677
Other assets	14,545	289,021
<b>Total assets</b>	<b>\$91,003,702</b>	<b>\$87,123,911</b>

<b>LIABILITIES</b>		
Grants payable	\$270,766	\$ —
Accounts payable and accrued expenses	155,903	142,899
Other liabilities in connection with the sale of assets	15,700,421	10,168,167
<b>Total liabilities</b>	<b>\$16,127,090</b>	<b>\$10,311,066</b>

<b>NET ASSETS</b>		
Unrestricted	\$74,876,612	\$76,812,845
<b>Total net assets</b>	<b>\$74,876,612</b>	<b>\$76,812,845</b>

<b>Total liabilities and net assets</b>	<b>\$91,003,702</b>	<b>\$87,123,911</b>
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## Board of directors and staff

### Board of Directors

**Robert W. Boyce†**

Science teacher, Malvern Preparatory School for Boys; Captain, U.S. Navy (retired)

**Mary Ann Dailey, RN, DNSc**

Assistant Professor, Department of Nursing and Health, DeSales University

**Sharon I. Davidheiser, MD**  
**Executive Committee Member**

Internal Medicine, Pottstown Medical Associates

**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**

Internal Medicine, physician advisor, Pottstown Memorial 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†**

**Board President**

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

**Robert H. Moses†**

Retired Administrative Vice President, National Penn Bank

**Reginald Nealy†**

Professor, Department of Criminal Justice, West Chester University

**Charles F. Palladino†**  
**Board Vice 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 Secretary**

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

**Nancy J. Mitchell**

Grants Assistant

† Former Pottstown Memorial Medical Center and Pottstown Healthcare Corporation Board member.