

NEWS FROM OTTAUQUECHEE HEALTH FOUNDATION

GRANTS, FUNDING AND SUPPORT BECAUSE GOOD HEALTHCARE MATTERS TO US ALL

JUNE 2011

ISSUE 6

A MESSAGE FROM THE PRESIDENT

It is with great pleasure that I write to you all as the new President of the Board of Trustees. Our outgoing President Meg Seely did a magnificent job of leading the organization during her two-year tenure, and I am so pleased that she will continue to serve as a Trustee. Her insight and experience continue to be invaluable to the Foundation, and we are lucky to have her.

I know that all our members will join me in sending their heartfelt thanks to our outgoing Executive Director Tom Roberts, who is leaving the Foundation to take up a new position at the Vermont Community Foundation in July. Tom has been extraordinary. Over the course of his 8½ year tenure, he shepherded over 1.5 million dollars into our community through Organizational and Good Neighbor Grants, while his vision for shaping a healthy future for the area directly contributed to the creation of innovative new programs such as the Community Care Coordinator position established last year. We wish Tom all the best as he embarks on the next chapter of his remarkable career. Going forward, Tom's essential responsibilities will be handled by the enormously capable Deborah Heimann, who has graciously agreed to take a leave of absence from our Board in order to step in as Interim Executive Director.

We are also saying goodbye to another old friend; our much-loved Administrative Assistant and Good Neighbor Grants

Coordinator Judith Smith will be moving to California at the end of this summer. Judith has been indispensable, and she will be greatly missed. Her replacement Milena Zuccotti has been learning the ropes since early March, and we are pleased to have the benefit of her skill and energy as we move forward.

Change comes to us all. Transitional periods can be challenging, but they can also be hugely rewarding opportunities for improvement and progress. In the coming months, the Board of Trustees will seize the opportunity presented by these transitions to examine every aspect of our current programming and operations. Our goal is to ensure that we are addressing the health care needs of our community in the most efficient manner possible. For the past 15 years, we have been a vital resource to the area, quietly promoting and supporting programs which directly impact the health of the community. We honor that history, and we look forward to building on it to ensure a healthier tomorrow.

Here's to the future!

Mark E. Melendy
President, Board of Trustees



A Message from Tom Roberts

We honor our outgoing Executive Director Tom Roberts for his 8 1/2 years of dedicated service to OHF, and we invite all our members to visit our website at www.ohfvt.org to read his personal message of farewell.

The Ottawaquechee Health Foundation office is on the second floor of the Simmons Building, 32 Pleasant Street in Woodstock, Vermont.

P.O. Box 784
Woodstock, Vermont 05091
Phone: 802-457-4188
Fax: 802-457-9072
Email: ohf@sover.net
Website: www.ohfvt.org

Board of Trustees

Mark E. Melendy
President

Anne Marinello
Vice President

Judith Hills, M.D.
Secretary

Joseph A. Boyd
Treasurer

Liza Deignan

Susan Inui-Kelley

Marian Koetsier

John S. Moore

Meg Seely

Deborah Heimann
Interim Executive Director

Woodstock - Hartland - Reading - Plymouth - Killington
Barnard - Bridgewater - Pomfret - Quechee

2010 ANNUAL REPORT

The Ottauquechee Health Foundation had a successful year in 2010. We continued to award effective and high-impact grants to address the health needs in the community. Our financial outlook has improved as the economy has slowly come back following the recession, and has been enhanced by the success of our additional fundraising efforts. Federal and state efforts to reign in health care costs and provide greater access are moving along, and OHF stands poised to contribute to these efforts while continuing to provide unique grants, funding, and support to improve the health of our community.

Grants

At the core of OHF's work are the grants that we make each year. In 2010, we made a total of \$188,236 in grants in our three established categories.

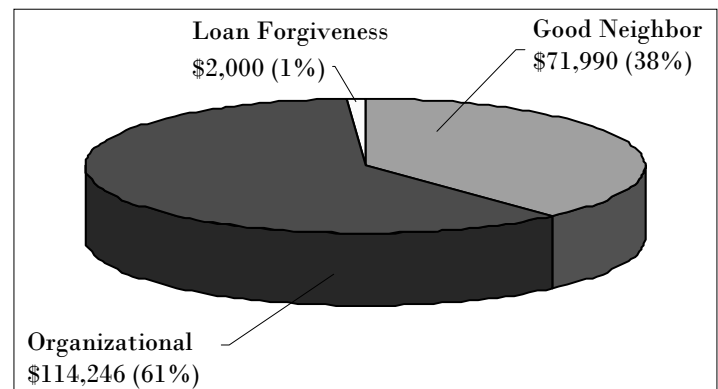
Our **Organizational Grants** included two projects developed from within the Foundation. The *Community Care Coordinator*, a project funded by the Foundation in partnership with Mt. Ascutney Hospital and Health Center and other community partners, will serve as a navigator for seniors and others with chronic illness to help them follow their treatment plan, review individual needs in their home-setting, and access community resources. The position will sit at the Ottauquechee Health Center and work in collaboration with other providers in the community. We are thrilled to report that Susan Jantos took on the position of Community Care Coordinator (CCC) with a start date of January 2011.

We are also delighted that the function which Lynne Tracy so ably performed at the Martha Lussier Health Information Referral Service (HIRS) will now be taken on by the Community Care Coordinator. HIRS has generously offered financial support for the CCC and will consider whether to merge its organization with the Foundation, should their mission be able to be discharged by the CCC.

The *Upper Valley Oral Health Public Awareness Initiative* was born from OHF when a grant to the Foundation to serve Vermont families more broadly was used to leverage \$10,500 in support from three local funders, including the United Way of the Upper Valley. The project, catalyzed by the presence of Dartmouth Institute MPH student Vanessa Hurley here at OHF, created a web presence for this regional initiative (www.uvoralhealth.org) and began to collect stories of oral health need in the Upper Valley.

At the same time, the Foundation was able to make 22 grants of \$116,710 to 16 agencies addressing

2010 Grants by Type



health needs in our community. A list of the year's organizational grants follows.

The **Good Neighbor Grants** program continued to meet critical needs for those without means to pay their health care costs. We made 58 grants, totaling \$71,990 in grants - a new record of funding. These payments, made on behalf of those in need, were sent directly to the doctors, dentists, pharmacists, medical equipment suppliers and mental health providers who provided the services. Dental grants once again made up three-fourths of the total funds granted. To address the continued demand for dental care, we worked with participating dentists to make the program more efficient and cost effective.

In 2010 we made the first of three annual payments on our **Loan Forgiveness Program**, which seeks to retain health care workers providing care in our service area. We are making graduated payments to help with student loans for two Physician Assistants at the Ottauquechee Health Center who joined that practice within the last few years. We also continued to fund educational scholarships through an organizational grant to Vermont Technical College.

Woodstock - Hartland - Reading - Plymouth - Killington
Barnard - Bridgewater - Pomfret - Quechee

Financial Summary

Statement of Assets (in 000s)

Current Assets	211
Endowment	2,340
<u>Fixed Assets, Net</u>	<u>458</u>
Total Assets	3,009

Revenue

The Foundation's annual revenue continues to derive from three main sources: the endowment, comprising investments of past gifts and bequests; the annual appeal and other contributions during the year; and the net income from our two rental properties at 32 Pleasant Street.

Income Statement (in 000s)

Income	
Endowment Transfer	119.2
Fundraising	68.0
Transfer, 2009 Grant	24.0
<u>Real Estate</u>	<u>269.3</u>
Total Income	480.5
Expense	
Grants	188.2
Total Administration	95.6
<u>Real Estate</u>	<u>201.6</u>
Total Expense	485.4
Net Income	-4.9

Expense

Our primary expenses continued to be our grants and the costs of running the Foundation, including grant administration, fundraising, operating programs such as the Good Neighbor Grants and oral health initiative, and other community health leadership projects. We continued to manage our two properties at 32 Pleasant Street. The spaces within them are rented to both health providers and non-profit providers, with non-profit provider leases offered at below market rates. In 2010, we conducted an energy audit of the clinic building, implemented energy-saving lighting improvements, upgraded a portion of the ceiling, and renovated a portion of office space on the river level which was vacated by Mt. Ascutney Hospital.

Other Activities

Expanded Fundraising Goals

We raised our sites for fundraising in 2010, seeking to garner \$40,000 from our annual appeal and \$35,000 through other contributions. We came close to our appeal goal (and with gifts arriving early in 2011, are off to a fine start for next year). In our first year of focused increase in fundraising efforts, we saw some success, particularly in raising funds for the Community Care Coordinator and the Oral Health Initiative.

Leadership Transitions

Meg Seely, who has so adeptly served as President of the Foundation for the past two years, steps down but will remain on the board for one more year. Mark Melendy, who has served as Vice-President for the past year, steps in as President. John Moore, Treasurer for the past four years, steps down to be succeeded by Joe Boyd in 2011. Sue Pelton Barrett retires as Secretary as her second term on the board comes to an end; Judy Hills takes on this role for 2011. In addition to Sue, three other board members depart the board in 2011 after years of loyal service: Lynn Peterson, John Brand, and Marty Whitney. The Board will miss their collective wisdom, energy, and humor.

Spread the Word about the Foundation's Work

The Foundation continued its efforts to make its work known in the community, both to ensure that those in need are served and to attract resources in support of our work. We made a successful tune-up of our webpage— www.ohfvt.org. While technology is a key to effective communication, we continue to find that word of mouth is the best way to share our good work.

In Summary

2010 was a successful and productive year for the Ottauquechee Health Foundation, due in large measure to the community's volunteer and financial support of our grant making, funding, and programming.

We welcome questions, comments, suggestions, and offers to assist with our work to address the health care needs of our community. Please contact us at:

802-457-4188

ohf@sover.net

PO Box 784, Woodstock, Vermont 05091

or through our website at www.ohfvt.org

**Woodstock - Hartland - Reading - Plymouth - Killington
Barnard - Bridgewater - Pomfret - Quechee**

2010 OHF ORGANIZATIONAL GRANT RECIPIENTS

Bog Chapel, Inc.

To offer spirituality and health classes at Thompson Center and Woodstock Terrace. \$800

Friends of the Ottauquechee Trails

To support extension and signage of walking trail, and health promotion in Quechee. \$750

Good Neighbor Health Clinic

To cover half the cost of providing medical and dental care to low-income uninsured residents in the OHF service area. \$9,000

Hannah House

To support community health outreach work and work with young pregnant and parenting youth living within our service area. \$6,000

Health Information & Referral Service

To provide funding for short-term, in-home caregivers to low-income individuals in OHF service area. \$3,300

Mt. Ascutney Hospital & Health Center

To fund creation of Community Care Coordinator to provide advocacy and support for seniors and chronically disabled. \$49,000

Ottauquechee Community Partnership

To fund local farm-to-school and health promotion initiatives with partner organizations. \$11,016

Spectrum Teen Center

To fund two programs for youth and parents about alcohol use and bullying with OCP and Students Against Destructive Decisions. \$900

Trek to Taste

To sponsor annual event to promote walking and healthy eating at national park. \$500

Upper Valley Haven

To fund Healthy Eating Program which provides demonstrations, recipes, and sampling for area residents participating in food shelf. \$3,800

Upper Valley Trails Alliance

To fund Passport to Winter Fun project in area elementary schools promoting active outdoor activity during winter. \$7,500

Vermont Technical College

Funds to provide educational grants for health care training to service-area residents who will provide health care to area residents. \$7,500

Volunteers in Action

To assist in coordinating volunteers who provide transportation services to medical appointments, short-term respite for caregivers and other health-related services for Hartland and Reading residents. \$3,000

Windsor Central Supervisory Union

To support hiring of a dental hygienist to provide oral health education and screening at five area schools, following the state's successful Tooth Tutor Program and experiment with dry brush cleaning project. \$5,000

Woodstock Area Council on Aging, Thompson Center

To support a transportation initiative at the Thompson Center providing medical and other transportation for community members. \$5,000

Woodstock Area Council on Aging, Thompson Center

To sponsor monthly caregiver support group for Alzheimer's and other chronic conditions. \$1,200

Zack's Place

To provide nutrition and exercise health and wellness program for area participants with special needs. \$2,200

Loan Forgiveness Program

The first year payment on student loan for a Physicians Assistant at Ottauquechee Health Center to promote staff retention. \$2,000

Space for Rent

A beautiful office suite is now available on the river level of the Ottauquechee Health Center. Two offices with lots natural light and spectacular river



views, a third office/conference space, and a reception area. A total of 460 square feet, newly renovated and carpeted. Healthcare or non-profit provider preferred. If you or someone you know is interested, please call us at 457-4188 for more information!

Woodstock - Hartland - Reading - Plymouth - Killington
Barnard - Bridgewater - Pomfret - Quechee

OUR DEEPEST THANKS AND APPRECIATION TO OUR DONORS

This list represents gifts received by the Foundation within the past 18 months. Our deepest thanks go to all our donors for their support. OHF makes every effort to make this list as comprehensive and accurate as possible. If your name is missing or you see any mistakes or inaccuracies, please let us know!

Sheila Armen and Shelley Yusko
 Craig and Sue Pelton-Barrett
 Peter G. and Marjorie A. Behr
 Charitable Foundation
 Les and Susan Berge
 Joseph and Ann Marie Boyd
 The Boyle Community Pediatrics
 Program at CHaD
 John and Mary Beth Brand
 Suzanne Brian
 Jennifer and Peter Brock
 Joan Burdge
 The Byrne Foundation
 John and Laurie Chester
 Bill Chorske
 Leonard Cohen and Gail Smith
 Albert and Jean Conklin
 Elizabeth Deignan and Dan Bellmore
 Jan and Jennifer Dembinski
 Kathleen Dolan
 David and Cathleen Donath
 Paul and Marian Donnelly
 Kevin and Christina Donovan
 Allen and Gail Dougherty
 Matt Dunne and Sarah Taylor
 Ginny Eames and Richard Colantuono
 Bert and Kathleen Eiselein
 Bill and Titia Ellis
 Elizabeth Emmons
 Margaret Fanning and David Cate
 Barry and Susan Feinberg
 Jackie Fischer
 Dexter and Sally Foss
 Louise Fowler
 Elliot and Ina Gant
 Edgar and Joanna Garbisch
 Gary Gelbfish
 Kurt and Phyllis Gerrish
 Elaine Geyer
 Frances Gillett
 Glad Rags
 Oliver Goodenough and Alison Clarkson
 Dean and Harriet Goodwin

Granite United Way
 Jim and Joy Grossman
 Robert and Honore Hager
 Richard and Jill Hastings
 Deb Heimann
 Jim and Ann Heimareck
 George Helmer
 Wilfred and Sylvia Hill
 Hudson and Mardie Holland
 Gail Holmes
 Jack and Irene Jaglom
 Mary Johnstone
 Howard Jonas
 Robert and Deanna Jones
 Jeffrey Kahn
 Louis and Peggy Kannenstine
 Alan and Ruth Keitt
 Mike Kilcullen and Donna Hay
 Knez Family Charitable Foundation
 Mark Knott and Rachel Hochman
 Ron and Sara Kobylenski
 Carl Kuniholm
 Joan Lang
 Lang McLaughry Spera
 Richard and Jane Leonard
 Todd and Jill Lloyd
 Christopher Lloyd and Vassie Sinopoulos
 Gary and Kelly Loeb
 Norwood and Joanna Long
 Maurice and Mary Jane Lorenz
 Anne Macksoud and Joby Thompson
 Oliver and Tita Manice
 Bruce and Suzanne Marier
 Neil and Anne Marinello
 John and Patsy Mathews
 Peter and Claire Mayoock
 Mark and Jo Melendy
 Chris and Sally Miller
 James Monahan and Colleen Mahoney
 John Moore
 Joseph and Amy Morel
 Malcolm Morgan
 Susan Morgan and Larry Perry
 Judith Hills and Lynn Murrell
 Charles and Carol Nettleship
 Northeast Delta Dental
 Jerry and Joan Oppenheimer
 Ottauquechee Turning Point
 Lynn and Nancy Peterson
 Jeem Peterson and Deb Jones
 Eleanor and James Pizzani
 George and Linda Racicot
 Joan Randall

Jack and Pam Reese
 Stuart and Judith Repp
 David Richardson
 Gordon and Pat Richardson
 Tom Roberts and Lorie Loeb
 John Roberts
 Carl and Joyce Roof
 Ellen Satterthwaite
 Brett Schoff and Joyce Robison
 Prudence Schuler
 John and Nancy Schullinger
 Stephen and Louise Schwebel
 Bruce and Meg Seely
 John and Mallory Semple
 Ad and Mavis Shaw
 Mark and Kim Sheffield
 Hank and Kathy Smith
 Jane S. Smith
 Orson St. John
 Michael Stoner and Denise Lyons
 Robert Talcott
 Carl and Ching-Wen Taylor
 Captain Philip and Mrs. Susan Tomlet
 Marc Torrey and Judith Smith
 Arjan and Tricia Van Der Schoot
 Imants and Karen Vitols
 Rob and Sandy Wallace
 John and Wendy Wannop
 Eric Wegner and Diane Kiernan
 Peter Welch and Magaret Cheney
 Martin and Christine Whitney
 Alan Willard
 Williamson Group Sotheby's
 International Realty
 Judy Williamson
 Bob and Joan Williamson
 Georgina Williamson
 Karl and Phyllis Wood
 The Woodstock Foundation
 The Woodstock Rotary Club

SUPPORT OUR GOOD WORK!

Contributions to the Foundation are 100% tax-exempt. We conduct an Annual Appeal campaign each fall, but gifts are gratefully accepted throughout the year. Contributions can be made by mail or via our secure website, www.ohfvt.org. We also gladly accept gifts of stock, matching gifts, charitable bequests or other planned gifts. Please contact us at 457-4188 with any questions about supporting the Foundation. Thank you!

**Woodstock - Hartland - Reading - Plymouth - Killington
 Barnard - Bridgewater - Pomfret - Quechee**

Ottauquechee Health Foundation

News From Ottauquechee Health Foundation is published by the Ottauquechee Health Foundation two to three times annually. Thanks to Joanne Boyle for newsletter template design, Paul Regan for logo design. Printing by Spaulding Press.

“Having a Foundation like yours in town is a gift in so many ways. My hope in the future is to give back to your Foundation and to help others.”

EDITOR: DEBORAH HEIMANN
ADMIN. ASSISTANT: MILENA ZUCCOTTI

OHF IS A PROUD MEMBER OF THE



Mission

The Ottauquechee Health Foundation promotes and supports programs that identify and help meet the healthcare needs in Woodstock and the surrounding communities.

P.O. Box 784, Woodstock, VT 05091 • 802-457-4188 • ohfadmin@sover.net • www.ohfvt.org

OTTAUQUECHEE
HEALTH FOUNDATION

GRANTS, FUNDING AND SUPPORT BECAUSE GOOD HEALTHCARE MATTERS TO US ALL

P.O. Box 784
Woodstock, Vermont 05091

Woodstock - Hartland - Reading - Plymouth - Killington
Barnard - Bridgewater - Pomfret - Quechee