

*Report to the Community 2007*



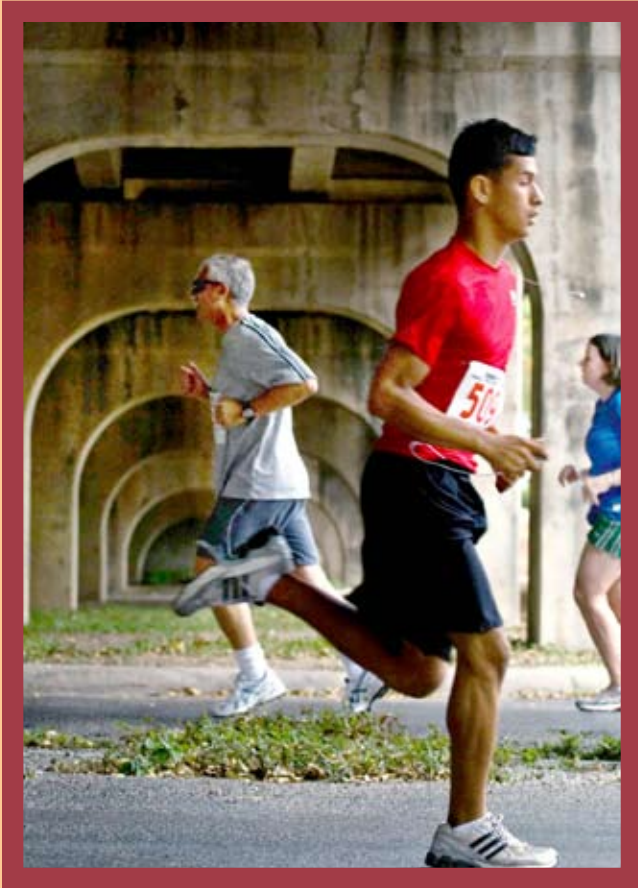
San Angelo Health Foundation  
San Angelo, Texas

*Improving the quality of life for the people of the San Angelo Area*



Let him who would move the world first move himself.

Socrates



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**Junior Achievement** business and community volunteers present lessons and activities to encourage critical thinking, positive behaviors and responsible decision making. Last year Junior Achievement programs impacted over 7,386 West Texas students with hands-on economic education programs with over 1,000 of those students in San Angelo.



The future is not a gift. It's an achievement.  
Henry Lauder

W

e are routinely asked, "What is the San Angelo Health Foundation? What is a Foundation?" In a broad sense, foundations have a history of changing lives through the organizations and programs they financially support. Education, public health, scientific research, the arts, social services, and the environment are a few of the many areas of activity for grant makers.

Specifically, San Angelo Health Foundation was established in March of 1995. Our mission is "to enhance the quality of life for the people of the San Angelo area." Grantmaking activities commenced in 1997. Qualifying non-profit organizations and public entities may apply for funding. In our relatively short history of eleven years, the San Angelo Health Foundation has given more than \$27 million to over 300 community projects in San Angelo and the Concho Valley. San Angelo Health Foundation, which began with \$44 million in total assets, ended fiscal year 2007 with net assets of \$65 million.



Many of our grantees are repeat recipients known to everyone such as Angelo State University, the House of Faith and West Texas Rehabilitation Center. Other grant recipients are not as well known. Trustees consider the strength of a organization, the need and impact of programs and quality and appropriateness of each proposal. Initiatives by the Foundation resulted in the San Angelo Visitor Center, a local community foundation (San Angelo Area Foundation) and Kids' Kingdom Community Playground.

Timing is perfect to now consider where we've been and our next steps. Foundation participation in downtown revitalization is evident in the support of the new YMCA, river projects, historic structures, our arts community, the library expansion, Girl Scouts and again, Kids' Kingdom and public park improvements. We will continue to work on downtown revitalization efforts.

Our visionary founders foresaw a community where all people have the knowledge, resources and environment to live a healthy life. Our volunteer Board of Trustees continues to assess the needs of our community and welcomes input and ideas. We encourage area organizations to contact our Foundation staff about funding for community projects.

A handwritten signature in black ink, appearing to read "T. Richey Oliver". The signature is fluid and cursive.

T. Richey Oliver, Chairman  
Board of Trustees

**Western Texas Lions Eye Bank Alliance** was founded in 1974 to promote eye donor awareness and harvest quality corneal tissue for transplants to the communities of West Texas. They procure an average of 30 donor tissues per year and import an additional 75 to 100 per year from other eye banks for transplants.



The real voyage of discovery consists not in seeking new landscape,  
but having new eyes.

Proust

# *Foundation Profile*

## **Foundation Profile**

The primary geographical focus of San Angelo Health Foundation is San Angelo and the Concho Valley. Consistent with our Vision and Mission statements, community health in its broadest form is our focus. In this regard a wide variety of community projects are viable. At the same time, the Foundation's origin and history lead the Trustees to make health issues and related programs a high priority.



# *Vision Statement*

## **Vision Statement**

The healthy San Angelo community would include a wide range of cultural, educational, health care, transportation, housing and public services. Access and affordability of services would provide all citizens an opportunity to achieve their highest level of independence and contribution to the community.

Grants were made in 2007 to Volunteer Fire Departments serving Christoval, Paint Rock and Robert Lee. Through mutual aid agreements, volunteer fire fighters and emergency medical personnel provide for public safety in rural areas of the Concho Valley.



No matter how dark things seem to be or actually are, raise your sights and see possibilities - always see them, for they're always there.

Abraham Lincoln



# Statement of Purpose

## Statement of Purpose

The intent of the Foundation is to remain in operation in perpetuity and to support community health in its broadest form.

For over eleven years the San Angelo Health Foundation has served San Angelo and our Concho Valley neighbors by supporting the efforts of local non-profit organizations and public entities. The Foundation, which began in 1995 with \$44 million, has committed in excess of \$27 million in charitable grants and ended fiscal year 2007 with assets of \$66,034,449



The Tom Green County Library relocation and expansion project will double the available space and serve library patrons through the year 2025. Amenities planned include but are not limited to: Children's areas, a Spanish language collection, a large-print collection, additional public-access computers and multi-purpose meeting space

**Big Brothers Big Sisters of America** was established more than 100 years ago.

Begun in San Angelo in 2005, this organization matches adult mentors with at-risk or disadvantaged children. They expect to provide services for as many as 200 young people next year.



If you think you can or you think you can't, you are right.

Henry Ford

# 2007 Grant Activity

## 2007 Grant Activity

RECIPIENT AND PURPOSE	Commitments 2007	Payments 2007	Future Payments
<b>Angelo Civic Theatre</b> Renovation of current facility and equipment purchase	0	145,000	0
<b>Angelo Civic Theatre</b> Master plan for future facility needs of local performing arts organizations	0	0	37,977
<b>Angelo State University</b> Blackboard software expansion project to benefit students and professors **	150,000	0	150,000
<b>Angelo State University</b> Communities Lectureship in the Humanities	2,550	2,550	0
<b>Angelo State University Department of Nursing</b> High-fidelity simulation center to enhance students' clinical skills *	0	100,000	0
<b>Baptist Memorials Ministries</b> Additional Alzheimer's care units *	0	500,000	0
<b>Big Brothers Big Sisters of San Angelo</b> Capacity building grant to increase services	0	55,000	0
<b>Christoval Volunteer Fire Department Christoval, Texas</b> New tanker truck to volunteer organization serving Tom Green and surrounding counties	75,000	0	75,000
<b>City of Robert Lee VFD, Robert Lee, Texas</b> New multi-role fire truck	15,000	15,000	0
<b>City of San Angelo</b> Construction of new Rio Concho Sports Complex and Community Park	0	0	125,000
<b>City of San Angelo</b> Renovation of the San Angelo Convention Center	500,000	500,000	0
<b>Concho County, Lowake, Texas</b> Renovation of Lowake Community Center **	30,000	0	30,000
<b>Concho County Hospital, Eden, Texas</b> Computerized radiography *	36,830	36,830	0
<b>Esperanza Health &amp; Dental Centers</b> To establish a clinic in north San Angelo to serve the uninsured and underinsured population *	0	250,000	0

A Simulation Center at the College of Nursing at **Angelo State University** incorporates computer-generated simulations, videography and peer-to-peer interaction to raise the level of instruction and enhance students' clinical and decision-making skills during realistic patient-care scenarios.



Every single problem you have in your life is the seed of an opportunity for some greater benefit.

Deepak Chopra

# 2007 Grant Activity

RECIPIENT AND PURPOSE	Commitments 2007	Payments 2007	Future Payments
<b>First United Methodist Church, Mason, Texas</b> New furnishings and equipment for their daycare center	8,340	8,340	0
<b>Galilee Community Development Corporation</b> Match funds to construct new homes for low-income families	0	18,750	20,658
<b>Hendrick Medical Center, Abilene, Texas</b> New School of Pharmacy in Abilene	0	100,000	0
<b>Hospice of San Angelo</b> Support for their bereavement program	0	100,000	0
<b>House of Faith</b> Roberts' House Transitional Housing Project for post high school young men	75,000	75,000	0
<b>Howard College San Angelo</b> Finish out space at West Texas Training Center for classrooms and lab space	446,048	446,048	0
<b>Institute of Cognitive Development Inc. (ICD)</b> Support for their counseling program	42,577	42,577	0
<b>Junior Achievement of West Texas San Angelo, Texas</b> Support for organization providing economic education programs to San Angelo students	25,000	12,500	12,500
<b>MOSAIC Redwine Childcare Center</b> Match funds for scholarships for children with special needs**	100,000	0	100,000
<b>Paint Rock VFD, Paint Rock Texas</b> New fire station for volunteer organization**	50,000	0	50,000
<b>Rebuilding Together San Angelo Inc.</b> Roofing initiative to provide safe, weatherproof homes to low-income elderly in Tom Green and Sterling Counties	0	25,000	0
<b>Rio Concho Retirement Community</b> Replacement plumbing for senior housing**	60,000	0	60,000
<b>San Angelo Area Foundation</b> Scholarship honorarium for Steve Stephens	10,000	0	10,000
<b>San Angelo Area Foundation</b> New technology	35,000	0	35,000

**The Green Houses at Baptist Memorials Center** are designed like a home inside and out to provide care for residents with Alzheimer's. It is the first facility of its kind in Texas.



The time is always right to do what is right.

Martin Luther King, Jr.

# 2007 Grant Activity

## 2007 Grant Activity

RECIPIENT AND PURPOSE	Commitments 2007	Payments 2007	Future Payments
<b>San Angelo Area Foundation</b> Matching grant for scholarship awards	0	200,000	0
<b>San Angelo Independent School District Athletic Department</b> Construction of a new field house **	0	0	125,000
<b>San Angelo Independent School District</b> San Jacinto school health clinic renovation *	0	218,763	0
<b>San Angelo Museum of Fine Arts</b> Oakes Street renovation project to provide additional educational space	0	100,000	0
<b>Sonrisas Therapeutic Riding, Inc.</b> Replacement horses for their therapeutic riding program	8,000	8,000	0
<b>Tom Green County Library</b> Library renovation and expansion project	0	437,500	437,500
<b>United Way of the Concho Valley</b> File of Life emergency notification system for elderly and disabled individuals	10,000	10,000	0
<b>West Texas Rehabilitation Center</b> New Electronic Medical Records system **	250,000	0	250,000

\* The generous gift of Myrtle Williams in honor of her parents, William Harden Williams and Mary Eveline Holmes Williams, made this bequest through the San Angelo Health Foundation possible.

\*\* Grant disbursements are contingent upon satisfaction of future events.

**Rio Concho Retirement Community** was established in the early 1960's to provide a choice of affordable housing options to persons age 62 and over and currently offers three distinctly different housing options for over 700 elderly residents.

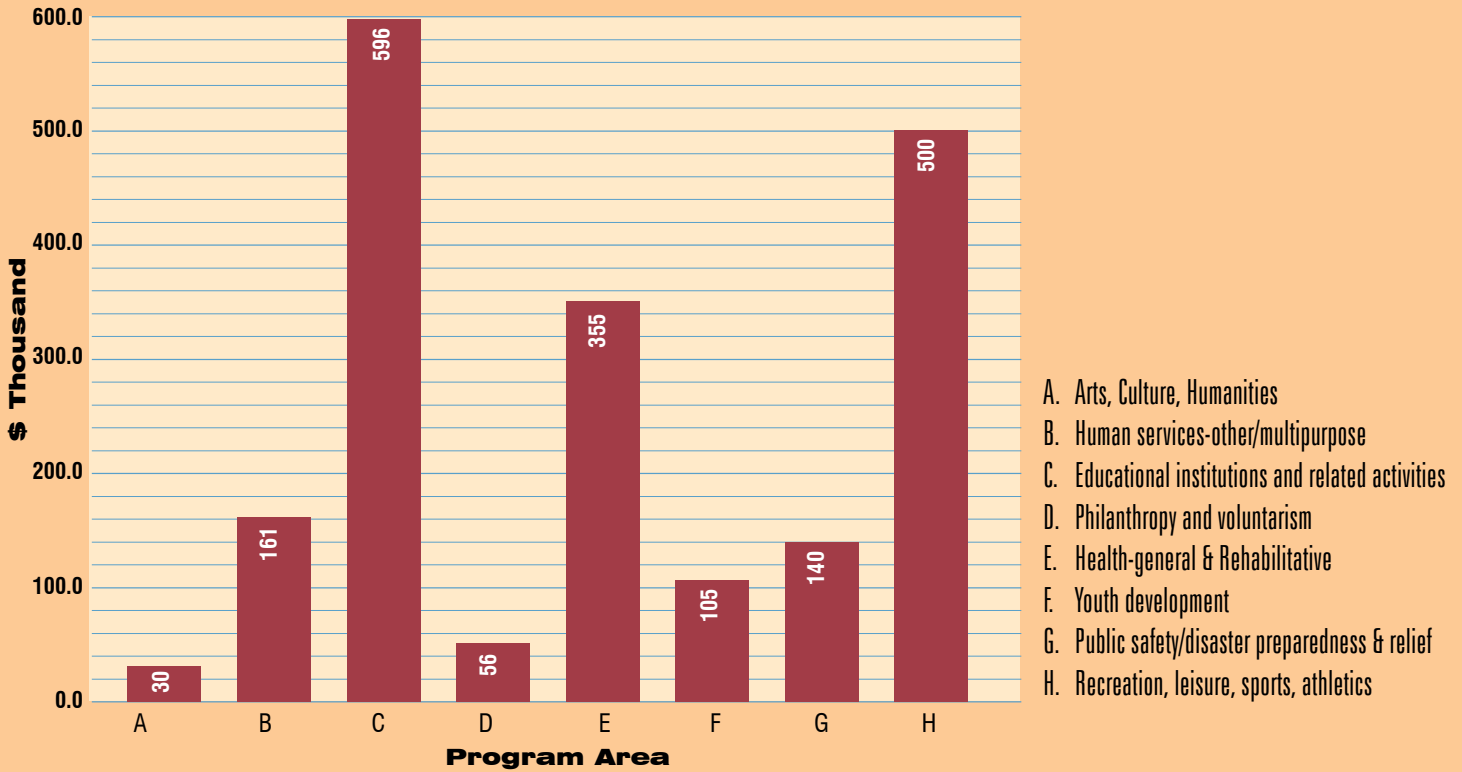


The things that matter most must never be at the mercy of the things that matter least.

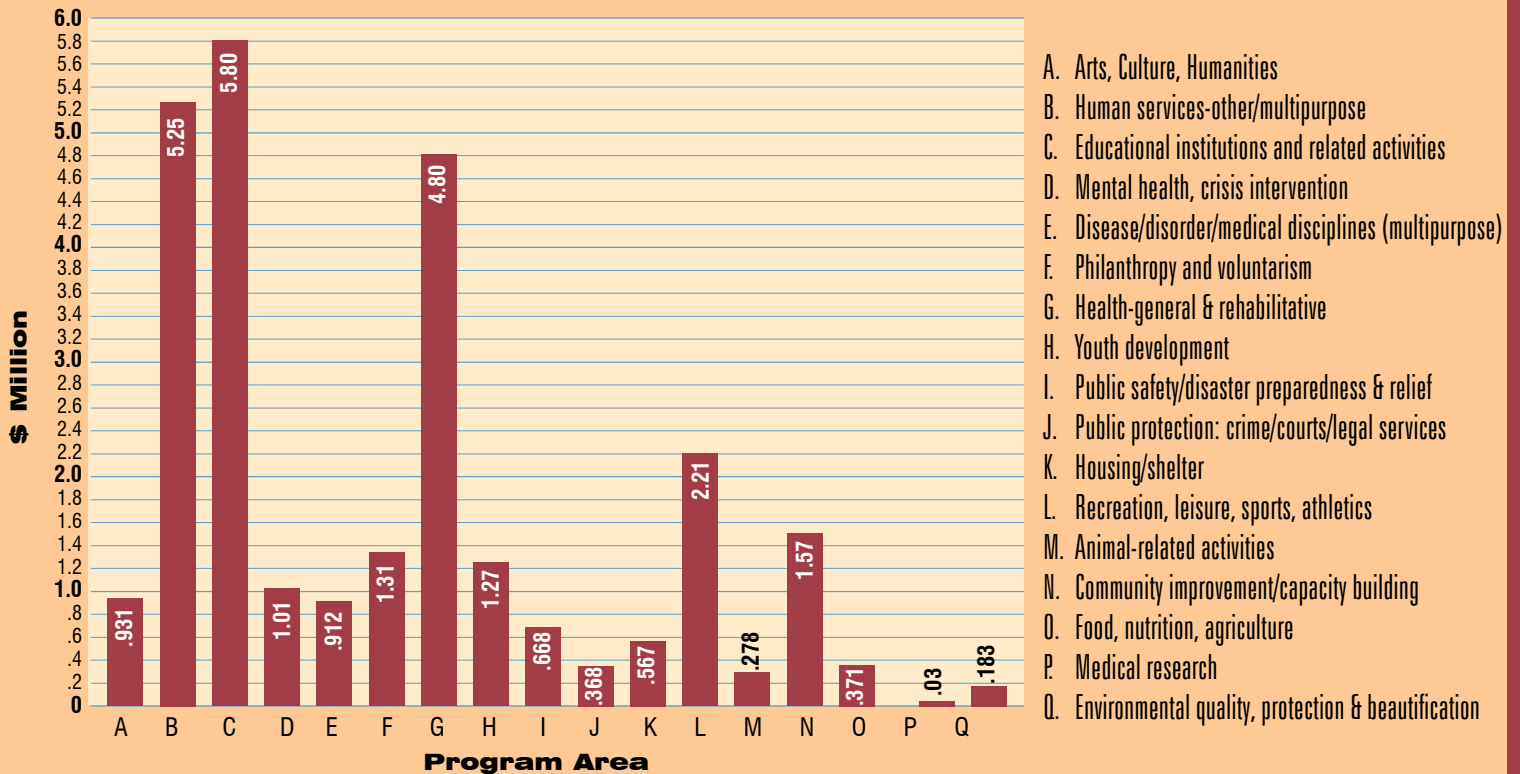
Brian Tracey



## Grants by Program Area Total Commitments \$1,942,795



## Grants by Program Area since inception 1997-2007 Total Commitments \$27,551,034



# Trustees and Staff - 2007

## Officers

T. Richey Oliver, Chairman  
Robert S. Patyrak, M.D., Vice Chairman  
Hugh Lamar Stone, III, Treasurer  
Mike Boyd, Secretary

## Trustees

Marilyn Aboussie  
George Alexander  
James P. Cummings  
Rick DeHoyos  
O. Sterling Gillis, M.D.  
Sande Vincent Harrison  
Karen Pfluger  
Joanne Rice  
F. L. "Steve" Stephens  
Joe B. Wilkinson, M.D.

## Advisory Trustees

John Mark McLaughlin  
Jean Guthrie Ryon

## Staff

Tom Early, President  
Vicki Ford, Administrative Officer



It's never too late to have a happy childhood.- Edith Ann



F. L. Stephens

*F*. L. 'Steve' Stephens served as Chairman of the Board during the sale of Angelo Community Hospital and transition of the hospital to San Angelo Health Foundation. With the support of the San Angelo Health Foundation and under his leadership, the first local community foundation was formed in the San Angelo Area Foundation. Mr. Stephens' vision for local philanthropy is evident in many venues, including the Junell Center Stephens' Arena at Angelo State University, the Town & Country Annual POPS July Concert and, most recently, the Tom Green County Library expansion project.

At the Annual Meeting of our Trustees in December 2007, Mr. Stephens was presented with an honorarium in recognition of his service totaling thirty years, eighteen on the hospital board and twelve on the board of the Foundation. A gift of \$10,000 to the Stephens Fund for ASU Athletics in honor of Trustee F. L. 'Steve' Stephens will benefit future students attending Angelo State University.

Mr. Stephens remains actively involved in community events. He and wife Pollyanna co-chair the "Beacon to the Future" fundraising campaign to benefit the Tom Green County Library.

Richey Oliver, current Chairman of the Foundation Board, expressed his appreciation, "We are ever grateful for Steve's contribution of time and talents over the years. We can't thank him enough for his vision and leadership."

Steve has graciously accepted an appointment as Advisory Trustee to the San Angelo Health Foundation and in that capacity will continue his legacy of philanthropy.

**Galilee Community Development Corporation** was organized to assist low to moderate income families in obtaining decent, affordable housing. New homes are constructed in targeted neighborhoods.



The best way to predict the future is to create it.  
Peter Drucker

# SAN ANGELO HEALTH FOUNDATION

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## Statement of Financial Position\*

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DECEMBER 31, 2007

### ASSETS

Cash and cash equivalents	\$ 251,110
Investments, at market	60,497,836
Land, building and equipment & other net	5,285,503
Total Assets	<u>\$ 66,034,449</u>

### LIABILITIES AND NET ASSETS

#### Liabilities

Grants payable	\$ 668,634
Accounts payable	45,518
Excise tax payable	21,250
Total Liabilities	<u>735,402</u>

#### Net Assets

Unrestricted	64,479,866
Temporarily restricted	819,181
Total Net Assets	<u>65,299,047</u>

Total Liabilities and Net Assets \$ 66,034,449

Grants totaling \$840,000 are approved but not accrued in the above Statement of Financial Position because they are conditioned on the occurrence of future events.

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## Statement of Activities

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FOR THE YEAR ENDED DECEMBER 31, 2007

### UNRESTRICTED REVENUE AND SUPPORT

Realized Investment gains and Investment income (net of fees)	\$ 6,793,551
Unrealized investment gains (loss)	(1,571,418)
Oil and gas income	301,649
Other income	6,350

TOTAL UNRESTRICTED REVENUE AND SUPPORT \$ 5,530,132

### UNRESTRICTED EXPENSES

Program and administrative costs	505,041
Excise taxes	142,956
Total Expenses	<u>647,997</u>

INCREASE IN NET ASSETS BEFORE GRANTS 4,882,135  
Grants 1,512,254

INCREASE IN NET ASSETS \$ 3,369,881

\* Unaudited

# *Grant Application Information*

## **Grant Application Information**

Applicant organizations must have an exemption from the Internal Revenue Service indicating that it is an organization described in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and is treated as other than a private foundation within the meaning of Section 509(a) of the code. Public institutions may also qualify if the grant requested is to be used exclusively for public purposes.

Organizations meeting the above guidelines may submit grant proposals that address an identifiable current need, demand or problem in the community that is defined and documented by the applicant organization. Applications are accepted on a continuing basis.

Information detailing the procedures for grant applications and distribution of funds is available at [www.sahfoundation.org](http://www.sahfoundation.org) or by contacting:

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San Angelo, TX 76902-3550

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FAX 325.486.1125  
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San Angelo, TX 76903

Foundation staff:  
Tom Early, President - [tomearly@sahfoundation.org](mailto:tomearly@sahfoundation.org)  
Vicki Ford, Administrative Officer - [vford@sahfoundation.org](mailto:vford@sahfoundation.org)



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Trustee portrait by Tom Clemens

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