



# Living Well Foundation



ANNUAL REPORT  
2016

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# OVERVIEW SUMMARY

## STRATEGIC FOCUS

In 2016 the Foundation continued investigating opportunities for expansion of school-based health centers within the 8-parish service area. The Foundation also continued the ongoing support for dental hygiene clinics with the University of Louisiana at Monroe (ULM), as well as a number of new projects as a part of the grant-making activities. Rising interest rates late in the year provided new challenges to maintaining these efforts.

## FINANCIAL HIGHLIGHTS

With the trend toward higher interest rates, the Foundation had to adopt new perspectives in order to attain its overall goals. This allows the Foundation to position its portfolio for increased earnings while minimizing risks from the impact of those higher interest rates on the market value of the investment portfolio and ensuring the protection of the principal value of that investment portfolio as the investments mature.

## OPERATIONS

Active grants during 2016 included \$206,676 in funded projects, with new grant awards for \$2017 of \$325,191. Outreach to other parishes continued with new projects. Alignments with federally qualified health centers (FQHCs) assure continued viability of the school-based health centers within the region and allow the Foundation to seek new arrangements in other healthcare settings. The Foundation primarily focused on its strategic goal to place at least one school-based health center within each parish. A 5-year renewable agreement with ULM for dental hygiene clinics continued to successfully operate with both the mobile dental hygiene unit and the school-based dental hygiene clinic. Operating expenses of the Foundation decreased by 12.5% from 2015.

## LOOKING AHEAD

Expansion of school-based health centers remains a major goal for the Foundation. Important pursuits include further projects with federally-qualified health centers and non-profit hospitals in the outlying parishes. For the Foundation to effectively utilize its resources, it must provide funding to projects which have measurable impact and results. Investigation into the opportunity for a trauma center for Region 8 continues, but will require collaborative efforts for realization. The potential for effective healthcare projects is limitless, and the Foundation will utilize strategic partnerships and leveraging resources to address these issues.

*Alice M. Prophit – President/CEO*

*Mayor Dave N. Norris – 2016 Board Chair*

*Deion T. Hemphill – 2017 Board Chair*

# 2016 BOARD OF DIRECTORS

**Mayor Dave N. Norris**, *Board Chair* \*  
City of West Monroe

**Deion T. Hemphill**, *Vice Chair, Finance/Investments Committee* \*  
CFO – Louisiana Plastic Industries

**Courtney Hornsby**, *Vice Chair, Programs/Grant Review Committee* \*  
President – West Monroe West Ouachita Chamber of Commerce

**Carl Turner**, *Vice Chair, Planning/Operations Committee* \*  
Major – West Monroe Police Department

**Julian B. Johnston**, *Board Appointee* \*  
Retired CPA

**Don Banks**  
Pastor – Greater Realness Church

**Leah Biley**  
Program Manager – Ouachita Parish School Board

**Florence Gibson, Ph.D., LMFT, APRN-CNS**  
Marriage/Family Therapist – Positive Changes

**A. Whitfield “Whitty” Hood, Jr.**  
Retired Banker

**Louis E. “Ed” McGuire, Ph.D.**  
Retired Psychologist

**John Shepard, DDS**  
Dentist

**Jimmy Snow, LPC**  
CEO – Strategic Counseling Solutions, Inc.

\* served on the Executive Committee

# MISSION AND SERVICE AREA

## Mission Statement:

*The Living Well Foundation is committed to improving the wellness of our community and the physical and mental health of individuals in our service area.*



*8-parish service area of the Foundation*

# FINANCIAL SUMMARY

## STATEMENT OF FINANCIAL POSITION

The value of the Foundation's net assets reflected a decrease of \$507,540 during 2016 as compared to an increase of \$3,036 in 2015, due to the impact of rising interest rates on the investment holdings of the Foundation.

	FOR THE YEAR ENDED DECEMBER 31	
	2016	2015
<b>Revenues</b>		
Investment Income	\$ 770,853	\$ 807,157
Unrealized Losses	(723,584)	(169,319)
Event Revenue	4,865	5,210
Gifts and Endowments	850	800
<b>Total Revenues</b>	<b>52,984</b>	<b>643,848</b>
<b>Expenses</b>		
Health and Welfare	560,524	640,812
<b>Increase (Decrease) in Net Position</b>	<b>(507,540)</b>	<b>3,036</b>
<b>Net Position at beginning of Year</b>	<b>47,414,782</b>	<b>47,411,746</b>
<b>Net Position at end of Year</b>	<b>\$ 46,907,242</b>	<b>\$ 47,414,782</b>

# FINANCIAL SUMMARY

## STATEMENT OF TOTAL OPERATING EXPENSES

Total operating expenses were \$560,524, including \$309,999 for grants, programs, and initiatives, and including \$250,525 for other operating expenses. Within other operating expenses, professional fees and depreciation totaled \$101,698 and administrative expenses were \$148,827.

TOTAL OPERATING EXPENSES	
<b>Grants, Programs, and Initiatives</b>	\$ 309,999
<b>Accounting, Auditing, Insurance, and Legal Fees</b>	55,177
<b>Investment Management Fees</b>	46,521
<b>Administrative Expenses</b>	148,827
<b>Total Operating Expenses</b>	<b>\$ 560,524</b>

## STATEMENT OF EXPENSES FOR GRANTS, PROGRAMS, AND INITIATIVES

A grant cycle was held in the Fall of 2016 with \$325,191 awarded to 18 agencies for projects within the 8-parish service area. In addition, \$31,430 was funded through a dental hygiene initiative with the University of Louisiana at Monroe, and \$66,875 was provided to fund new equipment for school-based health centers in Morehouse and Ouachita Parishes.

GRANTS, PROGRAMS, AND INITIATIVES	EXPENSES
<b>Grant Awards</b>	\$ 325,191
<b>Dental Hygiene Initiative</b>	31,630
<b>School-Based Health Centers (SBHC) Initiative</b>	66,875
<b>Other Foundation Initiatives</b>	540
<b>Sub-Total of Funding</b>	<b>\$ 424,236</b>
<b>Return of Unspent Grant Awards</b>	(14,237)
<b>Unused Dedicated SBHC Funds</b>	(100,000)
<b>Total Grants, Programs, and Initiatives</b>	<b>\$ 309,999</b>

# INVESTMENTS AND HOLDINGS

As of December 31, 2016, the portfolio of the Foundation included U.S. backed notes and bonds of varying maturities with an average maturity of 4.2 years and average duration of 4.0 years, and total actual holdings to maturity (without variance for market value) of \$47,977,598, including certificates of deposits and money market mutual funds. GAAP reporting requires that investment holdings must be shown at their fair market value on financial statements, and the Foundation's investments on 12/31/16 consisted of the following securities at fair market value of \$47,056,685.

INVESTMENT TYPE	FAIR VALUE	% OF TOTAL
<b>Federal Farm Credit Bank Agency Notes</b>	\$ 15,840,823	33.7%
<b>Federal Home Loan Mortgage Corporation Agency Notes</b>	11,638,682	24.7%
<b>Federal Home Loan Bank Agency Notes</b>	6,155,783	13.1%
<b>Federal National Mortgage Association Agency Notes</b>	4,745,389	10.1%
<b>Money Market Mutual Fund at Federated Investments</b>	4,372,598	9.3%
<b>U.S. Treasury Bonds</b>	2,803,410	6.0%
<b>Certificates of Deposit</b>	1,500,000	3.2%
<b>Total</b>	<b>\$ 47,056,685</b>	<b>100.0%</b>

Monies from matured or called bonds and notes and interest earned are managed in a money market mutual fund at Federated Investments as a "sweep account" invested only in short term U.S. Treasuries. Banks in Louisiana, or which have a branch in Louisiana, held time certificates of deposit within the investment portfolio and within limits secured by the FDIC. The Foundation maintains a checking account at Origin Bank, Inc., with a balance of \$73,818 as of 12/31/16, also secured by the FDIC.



# SCHOOL-BASED HEALTH CENTERS INITIATIVE

## ON-CAMPUS HEALTHCARE SERVICES FOR STUDENTS

During 2016 the Foundation implemented an initiative to promote and assist to establish school-based health centers within the service area. As a strategic goal, it was established to start up at least 1 school-based health center in each of the 8 parishes through relationships with school boards, federally qualified health centers, or local non-profit hospitals in arrangements to ensure ongoing long-term viability.



As a part of the services of a federally qualified health center, the school-based health centers have access to expanded services and additional programming in a reimbursement model focused to under-served populations.

Meeting the medical needs of the un-insured and under-insured children and teens at school can assist in providing care and intervention where it may otherwise not be sought or provided.

These points of service continue to be attractive for the school board and community, and for healthcare delivery to the Medicaid or under-insured residents.

To support a successful transition of the two West Monroe school-based health centers to Morehouse Community Medical Centers, Inc., (MCMC), a memorandum of understanding ensured operations funds, if needed, through the 2015-2016 school year. In September 2016, the Foundation received a letter from MCMC stating the school-based health centers required no further financial support from the Foundation.

# DENTAL HYGIENE CLINICS INITIATIVE

The Foundation continued its participation with the University of Louisiana at Monroe School of Dental Hygiene to provide dental hygiene services through the Riser school-based dental hygiene clinic and the mobile dental hygiene unit (MDHU). These clinics typically provide care to those who do not have access to, or do not access, local dental care services and are delivered on-site for the students.

## RISER SCHOOL-BASED DENTAL HYGIENE CLINIC

As a teaching environment for the University, the dental hygiene clinic at the Riser Elementary/Middle Schools is staffed by the professionals and senior students.

There are 3 chairs at the clinic, and the clinic operates 4 half-days a week based on school schedules. For 2016, \$19,183.04 was provided in funding.

TREATMENT	2016	2015
<b>Dental visits (cleaning)</b>	428	350
<b>X-rays</b>	253	209
<b>Sealants (number of students only)</b>	37	61
<b>Fluoride treatments</b>	374	313



# DENTAL HYGIENE CLINICS INITIATIVE

## MOBILE DENTAL HYGIENE UNIT (MDHU)

The mobile unit parks each semester either at a school location or community access point, including a month on the University campus. These services provide care to the under-served, especially children and young adults, through state-of-the-art equipment and senior dental hygiene students under the supervision of a dental hygiene professional.



The poster features the University of Louisiana at Monroe logo at the top left. The text reads: "University of LOUISIANA at Monroe", "MOBILE DENTAL HYGIENE UNIT", "TREATMENT MAY INCLUDE:", a list of services (X-rays, Deposit Removal, Sealants, Polishing, Fluoride, Diet Counseling), a photo of the mobile unit, the slogan "Making a Difference, One Community at a Time", the phone number "318-348-2530", and a list of supporters at the bottom.

Services are provided at no charge and are sometimes the first time of care for many.

Referrals for other extensive work, when needed, are typically made to area dentists for intervention and follow-up.

Total funding for 2016 was \$7,097.14.

TREATMENT	2016	2015
Dental visits (cleaning)	367	428
X-rays	150	213
Sealants applied (total)	308	461
Fluoride treatments	334	395

# GRANTS AND PROGRAMS

## ACTIVE GRANT PROJECTS DURING 2016

There were eleven active projects by qualifying organizations during 2016 in fulfillment of previously awarded grants. Those projects continued throughout the year with a variety of services for those in need.

### ARCO of Northeast Louisiana - \$18,750 – *Teaming for Early Intervention*



This grant provided for an Occupational Therapist for care delivery and 1 year of Physical Therapy consultation for staff education.

Services were provided to over 20 children by the OT and a total of 96 children were served by the professionals at ARCO for early intervention.

Billing for reimbursement is utilized for professional components where possible. Telemedicine approaches were also utilized for education for staff.

### The Center for Children and Families - \$16,500 – *Habla de Esperanza (Speak of Hope)*

Through funding, the Center was able to Increase access to mental health services for the Spanish-speaking population by recruitment of 4 bi-lingual therapists for a total onsite of 6.

The Spanish-speaking client base more than tripled, and training for local professionals was also provided on culture awareness and service provision.



# GRANTS AND PROGRAMS

## Children's Coalition of Northeast Louisiana - \$10,000 – Signs of Suicide



A suicide prevention program through screening, education, and intervention was provided to area schools in Morehouse, Ouachita, and Union Parishes.

Over 2,140 students were educated, 800 were screened with parent consent, and over 100 students had depression or suicidal tendencies with 4 hospital interventions.

In addition, training was provided to area professionals and interns.

## Food Bank of Northeast Louisiana - \$36,600 – School Pantry Childhood Hunger Program

By placing a school pantry at Union Parish Elementary School, the Food Bank was able to distribute over 49,330 pounds of food to 900 students.

Matching funds provided a driver for delivery of food to the area.



Staff at the school assisted with activities and backpack fills.

The SNAP Coordinator at the Food Bank provided information and assisted with sign-up, and flyers were provided to inform families of available local services.



# GRANTS AND PROGRAMS

## Franklin Medical Center - \$24,175 – Expansion of Adolescent Mental Health Services



The grant award was used to provide an additional day per week for the services of a child psychiatrist at the Behavioral Health Center to serve Franklin Parish and the surrounding rural areas.

In addition, a psychiatric nurse practitioner and a licensed clinical social worker were hired by the hospital based on the additional growth of new patients being seen and a decrease in waiting time for appointments.

Over 100 patients were seen at the clinic by the psychiatrist.

## Outdoor Wilderness Learning Center (OWL) - LA Methodist Children's Home - \$8,500 – Keep Calm and Ride On

Through two 12-week equine-assisted mental health sessions, the OWL was able to offer services to 19 at-risk and behavioral challenged youth in Lincoln Parish.

In addition, horsemanship skills were taught as part of the program, and two family days provided additional participation in intervention. Licensed professionals in equine-assisted therapy and counseling facilitated the activities.

Participating children, as reported by the professionals and the parents, saw increased confidence, interaction, and social skills.

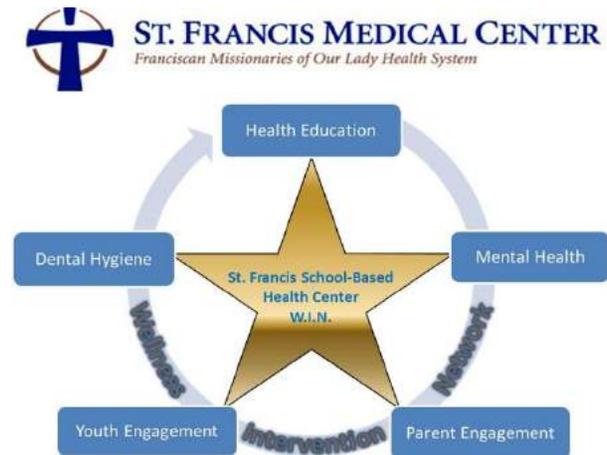


# GRANTS AND PROGRAMS

## St. Francis School-Based Health Center - \$10,000 – Wellness Intervention Network

Five components of health were offered to students and families as part of the intervention program, including health education, mental health, parent engagement, youth role models, and dental hygiene. Outreach with Monroe City Schools and the Monroe City Parks and Recreation allowed more after-hours programming in health and wellness education and awareness.

Immunizations to 24% of the participating elementary school children in the Monroe City School system were provided. During the summer health sessions, over 175 children participated. Over 5,060 dental hygiene kits were distributed to elementary children, and a special dental hygiene rap CD was locally developed.



## ULM Speech Pathology Department with the OT Department - \$13,901 – The Autism Center

Through the Speech Language Pathology and Occupational Therapy Departments at ULM, the start-up of a new Autism Center was developed for those patients, especially children, diagnosed with Autism Spectrum Disorder.

Funding provided start-up and marketing to promote awareness, begin referral relationships, and provide clinical services.

Outreach was conducted with healthcare professionals, civic clubs, and area agencies to inform the parishes of available resources and services.

Referrals were received immediately as awareness of the Autism Center became known and reception to this much-needed resource increased.

# GRANTS AND PROGRAMS

## Warren and Linda Trimble Ministries - \$15,000 – Freedom Center Project for Youth

At the Liberty Christian Church Southeast in Winnsboro, LA, services are provided to at-risk and under-served children after school and during the summer through a non-profit organization. Local education and vocational professionals provide support services in a wholesome environment, with meals and activities.

Through funding, the Center expanded these services for youth programs for over 30 4th-10th grade boys and girls, with certified trainers offering group and individual therapy sessions and including field trips, tutoring, and family education. Support for the programming includes the local court system and area professionals due to the challenges for disadvantaged youth.



## Wellspring Alliance - \$24,750 – Start Something for Healthy Futures

Working with Union Parish schools, the Big Brothers Big Sisters program delivered services utilizing an evidence-based model, the Second Step Socio-Emotional Program, for children identified at-risk or facing adversity. In addition, literacy levels were evaluated and a reading program was provided. Based on the success of the program, summer sessions were requested by the School System and outlying parishes sought information to have the model provided.



## West Monroe Civitans Club - \$10,000 – Smiles Park



Located at the Kiroli Park in West Monroe and in conjunction with the City of West Monroe, the Smiles Park is an Inclusive playground for children of all ages, especially those that are physically and mentally challenged.

Working with Shane's Inspiration of California on design and services, the Civitans Club of West Monroe undertook the large project with area fundraising support.

Completion and the grand opening were scheduled for June 2017.

# GRANTS AND PROGRAMS

## FALL GRANT CYCLE 2016

There were twenty-two applicants and 18 funded projects for a total of \$325,191 in the grant-making activities for 2016. All projects were funded for services beginning January 2017 and included activities by agencies in various parishes in the service area.

The priority of the grant cycle was "Access to Healthcare"

with a focus of "all ages; new or expanded programs for medical, dental, or mental health, with special emphasis on measurable long-term ongoing impact, and addressing gaps identified for Region 8 and the service area."



# GRANTS AND PROGRAMS

The following new grants were awarded for projects within the 8-parish service area to begin in 2017.

Organization	Project	Description of Project	Parishes to be Served	Approved Funding
ARCO	"Shaping Outcomes for Children with Disabilities"	Physical and behavioral health through licensed therapists	Within the 8 parish service area	\$ 18,650
Autism Center – University of Louisiana at Monroe	"The Autism Center"	Expand treatment and resourcing for the area	Within the 8 parish service area	\$ 34,060
Center for Children and Families	"Stand for Hope"	Implement new model of mental health services to children 0-10	Within the 8 parish service area	\$ 32,000
Children's Coalition	"SOS: Signs of Suicide"	Expand program for suicide prevention and intervention program	Ouachita, Morehouse, Union	\$ 10,000
Downtown and Greater Ouachita Lions Clubs	"CubSight"	Purchase of 2 digital cameras for eye screenings for all pre-k and kindergarten children at school	Ouachita	\$ 12,950
Franklin Medical Center	"Expansion of Behavioral Health Services into Local School System"	Provide psychiatric nurse practitioner in schools for screening	Franklin	\$ 9,600
Life Choices of North Central Louisiana	"Cooking for Life"	Hands-on cooking and education classes for young under-served parents	Lincoln	\$ 27,000
MedCamps of Louisiana	"Increasing Self-Sufficiency, Health, and Wellness through Summer Camping"	Purchase of equipment for medical education programs	Within the 8 parish service area	\$ 3,000
Ouachita Parish School Board	"Get Active, Get Motivated, Get Educated"	Purchase and implement "GoNoodle" program for elementary age children	Ouachita	\$ 26,750
Our H.O.M.E. with the Ouachita Regional Veteran's Association	Project HOPE	Provide support services and counseling for veterans	Within the 8 parish service area	\$ 30,000
Outdoor Wilderness Learning (OWL) Center – LA Methodist Children's Home	"Improving Health through Experiential Activities"	Expand equine therapy program to Jackson Parish and provide animal-assisted therapy program in special settings	Lincoln, Union, Jackson	\$ 15,000
Richland Parish Hospital	"Preventing Blindness from Diabetes in Northeast Louisiana"	Purchase of equipment for diabetic retinal exams and offer services in specialty program	Richland	\$ 32,834
Salvation Army	"Red Shield Emergency Shelter"	Emergency overnight lodging for displaced families	Ouachita	\$ 15,000
Seeker Springs	"Team Up"	On-campus mental health services	Ouachita, Richland	\$ 12,420
St. Francis Medical Center, Inc.	"Tobacco Cessation Program – Rural Expansion"	Teach tobacco cessation by certified specialists	Franklin and other rural parishes	\$ 2,740
Union Parish Hospital	"Improving Access to Healthcare"	Purchase of wheelchair accessible van	Union	\$ 25,000
Warren and Linda Trimble Ministries - Winnsboro	"Freedom Center Project for Youth, Young and Senior Adults"	Expand services for at-risk youth, their families, and seniors	Franklin	\$ 18,187
<b>Total Funding Fall 2016</b>				<b>\$ 325,191</b>

# OTHER INFORMATION

## INDEPENDENT AUDITORS' REPORT

The 2016 annual audit was performed by Huffman & Soignier, APAC, located in Monroe, Louisiana, and concluded on April 24, 2017, with an unmodified opinion on the financial statements.

Further, the firm reported no findings, and a management letter was not issued with the audit. A complete 2016 audit report as well as the 2016 Form 990 tax report can be found on the Foundation's website, [www.livingwellfoundation.net](http://www.livingwellfoundation.net).

## CONTACT INFORMATION

### **Living Well Foundation**

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