



*Living
Well
Foundation*

2022 Annual Report

Table of Contents



Executive Summary	2
Mission and Vision	3
Service Area	3
Board of Directors	4
Financial Summary	5
Foundation Initiatives	8
Special Funding Projects	9
Grants Awarded	10

The Living Well Foundation is a non-profit public charity created by Hospital Service District #1 of Ouachita Parish upon the sale of the public hospital in 2006. The proceeds are invested, and grants and initiatives are awarded within the service area from the earnings on the assets.



Executive Summary

Continuing the focus to the ongoing recovery from the pandemic and local disasters, the Foundation provided funding within a special grant cycle and dedicated initiatives. To address the increasing challenges to the health and well-being of communities in northeast Louisiana due to the lockdown and the return to active lifestyles, additional programming for community re-entry was supported. The need for mental health services increased across all ages, while availability of professional clinical personnel threatened goals.

Supply chains continued to delay major renovation or construction programs for all settings, and adjustments to awarded projects were necessary to accommodate longer timelines and completion. The gaps in workforce supply continued to affect projects and agencies across all areas.

Collaboration and networking with agencies, business, education, and health settings expanded to create larger impact approaches and solutions. Relationships with new non-profits benefiting specific populations added areas for focus and involvement, coupled with government and other funding programs. Partnering and leveraging resources with other funders and groups assisted the ability to address projects with broader application. More of these strategies will continue to produce more impactful outcomes for the region.

The investment portfolio began to benefit from the rise in interest rates as holdings matured. The previous strategies of short duration and diversification contributed to the Foundation's ability to maneuver more positively through the opportunities and to reposition the portfolio.

The near future will see the Foundation benefiting from the interest rate environment and having the resources to support projects that may address the gaps in healthcare professionals for the region as well as identified needs as populations return to more active lifestyles in community. More partnerships and collaborations will be important in addressing identified needs, especially mental health and suicide prevention. It will continue to be important to investigate and problem-solve with the depth of skill and talent within the region, including higher education, medical settings, government, and funding entities.

Alice M. Proffit
President/CEO

James E. Allbritton
Board Chair

Mission of The Foundation

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

Vision Statement

Through its programs, grants, and initiatives, and networking with area agencies and healthcare providers, as well as school boards, state universities and colleges, and other government entities, the Living Well Foundation envisions a future of improved quality of life and well-being for the populations of the Service Area with measurable social and economic impact.

8-parish service area of the Foundation



Board of Directors

Executive Committee

James E. Allbritton, Jr., CPA, Board Chair
Private Practice

Ken Phillips, Vice Chair – Finance/Investment Committee
Director, Business Intelligence – Lumen Technologies

G. Robert Huffstutter, D.D.S., Vice Chair - Programs/Grant Review Committee
Local Dentist

Alberta B. Green, M. Ed., NBCC, LPC-S, Vice Chair - Planning/Operations Committee
Founder & CEO – ABG Professional Development Solutions

Todd Burgess, Board Appointee
SVP and Sr. Relationship Manager – Progressive Bank

Shelby Sanchez Corral
Co-Owner – Corral Construction Company

Pamela Michelle Getret-Ford
Provider Relations Advocate – United Healthcare

Melanie Massey Groves, PT, PRPC
Owner – Melanie Massey Physical Therapy, MoJoy Studio, MoCo Leadership Coaching

Chris M. Pittard
CEO – Alli Management Solutions

Christine Wong Rambo, MBA, CEcD
Founder & President – Upsize Marketing Strategies

Doug Seegers
Director of Community Affairs – City of Monroe

Brandon M. Welch
Store Director – Brookshire Grocery Company
Owner – WELCHINC Development, LLC



Financial Summary

Statement of Financial Position

The Foundation's net position decreased \$1,541,596 during 2022 as compared to its \$469,267 decrease in net position during the prior year. While actual earnings on investments increased by \$128,588, total investment income decreased by \$1,031,375 in 2022, due to the increase in unrealized losses for notes held, all of which are held to maturity per policy and practice.

	FOR THE YEAR ENDED DECEMBER 31	
	2022	2021
Revenues		
Investment Income	\$ (983,101)	\$ 48,274
Event Revenue	25,760	19,400
Grants	25,000	25,000
Gifts and Endowments	1,653	269
Miscellaneous Income	460	376
Total Revenues	(930,228)	93,319
Expenses		
Health and Welfare	611,368	562,586
Increase (Decrease) in Net Position	(1,541,596)	(469,267)
Net Position, beginning of Year, as originally stated	48,032,009	48,501,276
Prior period adjustment	(1,952)	-
Net Position, beginning of Year, as restated	48,030,057	-
Net Position at end of Year	\$ 46,488,461	\$ 48,032,009

Statement of Total Operating Expenses

Total operating expenses increased by \$48,782, primarily related to the previous year's reductions for unused grant funds or revised funding for projects in the post-pandemic environment. Grant-making expenses were essentially similar in actual awards, as there were no large returns or reductions in previous commitments in 2022 as compared to 2021.

TOTAL OPERATING EXPENSES		
	2022	2021
Grants, Programs, and Initiatives	\$ 328,435	\$ 284,500
Accounting, Auditing, Insurance, and Legal Fees	59,004	60,679
Investment Management Fees	50,259	47,778
Administrative Expenses	173,670	169,629
Total Operating Expenses	\$ 611,368	\$ 562,586

Statement of Expenses for Initiatives and Grants

A grant cycle was held to address identified gaps and needs as communities continued to recover from the pandemic and local activities increased. This included 13 grants totaling \$248,581 to agencies, medical settings, and education. A special project funding of \$10,000 was provided for a pilot project by St. Francis Medical Center to determine better healthcare access strategies for certain ER readmissions. In addition, a special project funding of \$20,500 was provided to Louisiana Emergency Response Network for education for clinical teams for the two new local trauma centers. A second-year grant of \$25,000 was received from the state for dental sealants for children treated in school-based clinics and mobile dental hygiene units. Through the Dental Hygiene Initiative, a renewable 5-year agreement with ULM, \$33,578 was funded for dental hygiene services at a school-based clinic, the ULM on-campus clinic, and a mobile unit. There were no new school-based health centers committed for funding in 2022, although plans continued for future projects.

INITIATIVES AND GRANTS		EXPENSES	
	2022	2021	
Grant Awards	\$ 302,781	\$ 307,883	
Dental Hygiene Initiative	33,578	29,108	
School- Based Health Center (SBHC) Initiative	-	-	
Special Project – WM Medical Clinic	-	(25,000)	
Sub-Total of Funding	\$ 336,359	\$ 311,991	
Return of Unspent Grant Awards	(7,924)	(27,491)	
Total Initiatives and Grants	\$ 328,435	\$ 284,500	

Statement of Investments and Cash

As of December 31, 2022, the portfolio of the Foundation was diversified across allowed investments, all secured or insured, with an overall yield to maturity of 1.7% and modified duration of 1.3 years. Makeup of the portfolio included 13.5% in nontaxable Louisiana municipal obligations, 16.3% in taxable Louisiana municipal obligations, and 36.8% in U.S. government agency notes, 19.1% in US treasuries, and 14.3% in cash and cash equivalents. Total actual holdings at face value (without variance for market value) was \$48,170,731.

The Foundation's investments on 12/31/22 consisted of the following securities at fair market value of \$46,228,343, as compared to \$47,639,026 on 12/31/21.

INVESTMENT TYPE	FAIR VALUE	% OF TOTAL
LA Municipal Bonds	\$ 13,776,842	29.8%
Federal Home Loan Bank	11,047,024	23.9%
U.S. Treasury Notes	8,850,778	19.1%
Federated U.S. Treasury Cash Reserves	4,598,172	9.9%
Federal Farm Credit Bank	3,092,690	6.7%
Certificates of Deposit	2,013,592	4.4%
Federal National Mortgage Association	1,885,795	4.1%
Federal Home Loan Mortgage Corporation	963,450	2.1%
Total	\$46,228,343	100.0%



Foundation Initiatives

School-Based Health Centers (SBHCs)



School-based health centers provide licensed, professional healthcare staff on the campus of partnered schools for medical and behavioral health, and sometimes dental hygiene services. All students have access to services, regardless of ability to pay, and families or parents do not have to leave work or get transportation to pick up their students or take them for care. There are 12 SBHCs on school campuses in Morehouse, Ouachita, Richland, and Union Parishes. The Living Well Foundation continues to partner with federally qualified health centers to provide these centers of care. During 2022, plans continued for new projects and locations.

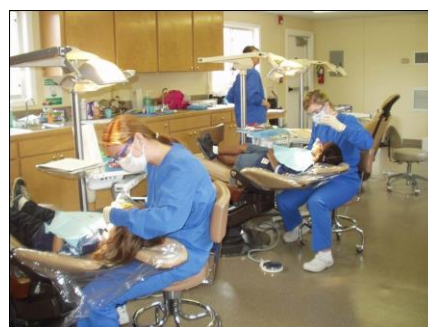
Dental Hygiene Clinics

In a partnership with ULM through their Dental Hygiene Program, the Foundation funds dental hygiene services at a dental hygiene clinic at Riser Elementary/Middle Schools and a mobile dental hygiene unit (MDHU). In 2022, the ULM on-campus dental hygiene clinic was added to the initiative for future funding.

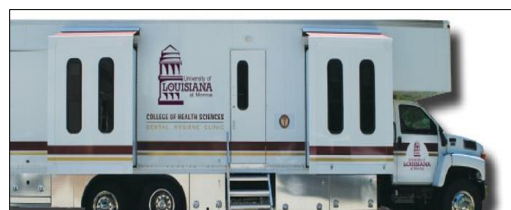
TREATMENTS - RISER	2022	2021
Total dental visits	339	316
Those receiving cleaning (prophylaxis)	275	254
Those who got X-rays, including Panorex	165	118
Number of students receiving sealants	35	33
Those who received fluoride treatments	320	130

TREATMENTS - MDHU	2022	2021
Total dental visits	359	234
Those receiving cleaning (prophylaxis)	196	224
Number of X-rays, including Panorex	313	235
Number of sealants	292	123
Those who received fluoride treatments	340	234

There are 3 patient chairs at the Riser clinic where senior students provide services and gain clinical experience. Funding of \$21,578 was provided for supplies and equipment.



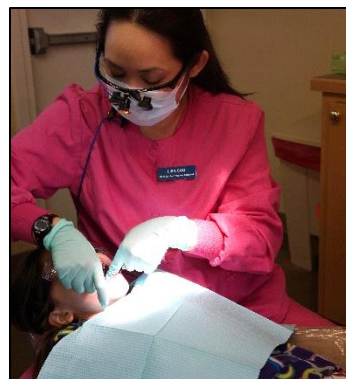
As a fully equipped mobile unit, the MDHU includes dental chairs, X-ray, and sterilization equipment. The 2022 funding of \$10,000 provided for an instructor and van maintenance.



Special Funding Projects

Dental Sealants Grant through WellAhead Louisiana Seals Smiles

In a second-year partnership with Louisiana Seals Smiles (LaSS) of WellAhead Louisiana Oral Health in the Louisiana Department of Health, the Foundation again received a grant of \$25,000. As a funded initiative to administer dental sealants to children ages 6-14 on school campuses during the 2022-2023 school year, the Foundation collaborated with three area organizations to administer the project, including CommuniHealth Services, Delhi Community Health Center, and the ULM Dental Hygiene Program.



St. Francis Medical Center Pilot Project for ER Readmissions and External Case Management

In a special project to work with certain repeat ER readmission patients, funding of \$10,000 was provided in matching funds with the hospital to engage Beacon Community Connections for external case management services. This approach incorporates direct interaction with patients to ensure they are able to access local primary care services for more preventive care as well as follow-up community care.



Trauma Care Education in Region 8 - LA Emergency Response Network

To provide specialty trauma and emergency care education for clinical providers and emergency responders in Region 8, LERN received a grant of \$20,500. These education sessions would assist the providers within the two new local Level III trauma centers in Region 8.



Grants Awarded

To provide funding for the ongoing recovery from the pandemic, as well as identified needs and gaps for medical, dental, and behavioral health services, a special grant cycle was opened in spring 2022. The priorities identified for the cycle were healthy lifestyles, access to healthcare, special services for youth and children, and large impact sustainable projects. A total of \$248,581 was awarded to these qualifying organizations.

Bright Star Ranch, Inc. – \$5,000

Funds were provided to construct and renovate space for equipment and supplies for the equine therapy program for foster and adopted children. Plans included 25 participants in 10 weeks sessions.



Children's Coalition of NELA - \$5,000

Supporting the evidence-based program Signs of Suicide for area schools, a grant was awarded to expand the suicide intervention/prevention services provided by specialists and educators and screen over 300 students in rural parishes.

Delhi Community Health Center - \$19,765



Matching funds were provided to assist in startup costs for a mental health program at a new school-based health center in Mangham, LA. A promotional campaign for mental health awareness was also offered. Over 2,100 students are served in 4 school-based health centers through HSD #1A in Richland Parish dba Delhi Community Health Center.

Franklin Parish HSD #1 dba Franklin Medical Center - \$25,000

Funding was provided to assist in the construction and expansion of educational facilities at the hospital. The setting will house the HAL S3201 simulation robot which will be utilized by the hospital and the LA Delta Community College in Winnsboro, LA, for clinical education.





Kiroli Foundation - \$15,000

Outdoor fitness equipment for the new trailhead at Highland Park Wetland Trails, City of West Monroe, was funded. The trails meander through the wetlands area and provide a community-based path for walking and biking and outdoor enjoyment.

Mary Bird Perkins Cancer Center - \$19,516

Free breast and colon cancer screenings were funded through the specialty testing mobile unit in various locations in northeast Louisiana. Any follow up testing or care was referred to local providers for further diagnosis as needed.



Mercy Medical Health Centers - \$35,000

The Jonesboro-based federally qualified health center expanded dental hygiene clinic services to Ruston, LA, and funding was provided to update dental chairs and equipment for the clinic. Originally opening in 2021 at the dental hygiene clinic, they served over 1,325 patients with 1,999 total visits in the first 6 months.



Northeast LA Children's Museum - \$20,000

Funding was provided to assist in the planning and design for the relocation and expansion of the museum to Forsythe Park in Monroe, LA. The project includes hands-on interactive and informational exhibits and different galleries focused to specialty areas for learning experiences. The project plans include a 2-year development and construction timeline.

Town of Farmerville - \$20,000

To support the development and provision of programming by the Boys and Girls Clubs of North LA through a Club Blue location in Farmerville, funding was provided in conjunction with local community support. A computer lab and multi-purpose room within a newly designated space will support various activities for youth.





Union General Hospital - \$30,000

A project to build a new rural health clinic for the hospital was funded. Staff will include 4 nurse practitioners and a new physician in the clinic. Hours will be extended, weekend hours will be offered to patients, and telehealth services will be expanded. Twelve exam rooms will provide expanded capacity for the area. Construction will begin upon commitment of the funding provisions from the hospital service district and Federal funds.



ULM Kitty Degree School of Nursing - \$4,400

To provide screening and support services to the homeless, funds were awarded for equipment and supplies to be utilized onsite at shelters by the caregivers. Students and professors within the nursing program attend to the general health needs of those served.

Wellspring Alliance for Families - \$38,400

Contracted psychiatric services were funded at the center to expand services by offering medication management and to offer telehealth platforms where needed. Services would be offered to assist in addressing the broadened mental health needs of local populations.



Zion Helping Hands, Inc. - \$11,500

Storage space refurbishing for the food pantry in Morehouse Parish was supported through a grant. Over 305 families are served in this important food ministry for the area. Equipment was provided by LSU Ag Services, and Entergy matched funds for outfitting the space.



Livingwell
FOUNDATION

Living Well Foundation

P.O. Box 2773
West Monroe, LA 71294

Tel 318.396.5066
Fax 318.396.5067

www.livingwellfoundation.net