



Living Well Foundation

2024 Annual Report



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



Livingwell
FOUNDATION

Executive Summary

During 2024, the Foundation expanded grant-making for focused initiatives and regional programs, providing more funds to projects, dental hygiene clinics, and school-based health centers. As revenue continued to increase based on rising interest rates, the Foundation increased the support for impact through the area's nonprofits, government and healthcare agencies, and education settings.



The region continues to see increased needs for addressing mental health gaps across all ages and households. This includes the ongoing shortages in healthcare professionals, workforce capacity, and available resources. Mentoring and retaining the youth for the region for future growth and economic impact have become bigger areas of focus for municipalities, Chambers of Commerce, and educational settings in collaborative arrangements. To support these efforts, the Foundation has further realized the importance of workforce programs, education, literacy, and broader networking to achieve goals of health and well-being in the Service Area populations.

A dedicated initiative for addressing dementia, Alzheimers, and other cognitive deficit disorders affecting the aging populations and their families and support systems continues to expand and include medical professionals, residents at local hospitals, and others who make decisions and provide resources to those living with these conditions. Suicide prevention and intervention training through the Foundation initiative has grown through the region to more schools and other education settings, with major impact and protection for children and youth. Trauma informed training for professionals working in the protection of our children has expanded through Foundation funding. And new school-based health centers were opened in rural parishes, with collaboration between school boards, health settings, and the business communities.

The Foundation's portfolio continues to benefit from the interest rate improvements, and investment strategies remain fluid for operations and long-term needs, positioning the Foundation for maximizing opportunities. As a networking and educational resource, the Foundation has responded to the region's needs and requests for more involvement, more knowledge for funding and grant-writing, and other areas of building bigger impact from projects through leveraging resources and bringing parties together.

Alice M. Prophit
President/CEO

James E. Allbritton
Board Chair

Board of Directors

Executive Committee

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

Todd Burgess, Vice Chair – Finance/Investment Committee
SVP and Sr. Relationship Manager – Progressive Bank

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

P. Michelle Getret-Ford, Vice Chair - Planning/Operations Committee
Provider Relations Advocate – United Healthcare

Chris Pittard, Board Appointee
CEO – Alli Management Services

Brad Cammack
Finance Director – WM Sports Complex 

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

Leah Martin
Vice President West Monroe Market – Marion State Bank

Kenchen Phillips
Director of Operations – Central Oil & Supply Company

Jason Pleasant
Chief of Police – City of West Monroe

Doug Seegers
Regional Director – Jani-King of Monroe

Brandon M. Welch
Owner – WELCHINC Development, LLC
Business Development Manager – Grow NELA



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

Financial Summary

Statement of Financial Position

The Foundation's net position increased \$659,820 during 2024 as compared to the \$1,566,050 increase in net position during the prior year. The difference in net position was primarily due to the reversal of unrealized gains of \$986,167 as compared to 2023, increased interest income to \$1,583,880 in 2024 as compared to \$1,068,973 in 2023, due to rising interest rates and higher returns, and \$454,147 more in grant-making in 2024.

	For the Year Ended December 31	
	2024	2023
Revenues		
Investment Income	\$ 1,900,993	\$ 2,340,638
Event Revenue	26,975	1,200
Gifts and Endowments	25	2,313
Miscellaneous Income	625	501
Total Revenues	1,928,618	2,344,652
Expenses		
Total Expenses, Health and Welfare	1,268,798	778,602
Increase (Decrease) in Net Position	659,820	1,566,050
Net Position, Beginning of Year	48,054,511	46,488,461
Net Position, End of Year	\$ 48,714,331	\$ 48,054,511

Statement of Total Operating Expenses

Total operating expenses increased by \$490,196 from the prior year, primarily due to \$454,147 in increased grant and initiative funding, and additional increases due to the annual community update event being rescheduled from 2023 to 2024, certain contractual services, and the relocation of the office space to a larger suite.

TOTAL OPERATING EXPENSES		
	2024	2023
Grants, Programs, and Initiatives	\$ 937,435	\$ 483,288
Accounting, Auditing, Insurance, and Legal Fees	57,691	62,819
Investment Management Fees	55,561	55,145
Administrative Expenses	218,111	177,350
Total Operating Expenses	\$ 1,268,798	\$ 778,602

Statement of Expenses for Grants and Initiatives

During 2024, a grant cycle was held with a focus to the priorities identified by the Board of Directors. There were 28 grants approved totaling \$632,534, compared to 17 approvals in the prior year funded at \$348,127.

Separately, as part of the School-Based Health Centers Initiative, total funding of \$300,000 was awarded to 3 projects, including expansion of a community clinic in Downsville, Louisiana, with CommuniHealth Services, three start-up clinics in Richland Parish with HSD #1B Richardson Medical Center, and broadening mental health services in clinics with HSD #1A Richland Parish Hospital, also in Richland Parish.

As separate funding in the Dental Hygiene Initiative, \$50,128 was funded to the ULM Dental Hygiene Program for services at clinics on the ULM campus, on a mobile dental hygiene unit (MDHU), and at the Riser Elementary/Middle Schools in a collaboration with the Ouachita Parish School Board and CommuniHealth Services.

There was a total of \$45,227 returned to the Foundation in unused funds due to some projects over-budgeting and two grant recipients unable to initiate and complete proposed projects.

GRANTS AND INITIATIVES		EXPENSES
	2024	2023
Grant Awards	\$ 632,534	\$ 348,127
Dental Hygiene Initiative	50,128	30,878
School- Based Health Center (SBHC) Initiative	300,000	165,000
Sub-Total of Funding	\$ 982,662	\$ 544,005
Return of Unspent Grant Awards	(45,227)	(60,717)
Total Grants and Initiatives	\$ 937,435	\$ 483,288

Statement of Investments and Cash

As of December 31, 2024, the portfolio of the Foundation achieved an overall yield to maturity of 3.94%, and modified duration of 3.3 years compared to 1.1 years for 2023, with a broad diversification across secured or insured state-allowed investments. The total return for 2024 was 3.8%. Total investments at face value (without variance for market value) was \$49,878,427, with total holdings including other cash at face value of \$50,035,714.

The Foundation's investments on 12/31/24 consisted of the following securities at fair market value of \$48,436,490, as compared to \$47,632,404 on 12/31/23.

INVESTMENT TYPE	FAIR VALUE	% OF TOTAL
US Treasury Notes	22,856,742	47.2%
Federal Home Loan Banks	14,654,984	30.3%
Federal Farm Credit Banks	3,980,690	8.2%
LA Municipal Bonds	3,854,367	8.0%
Federated US Treasury Cash Reserves	1,283,427	2.6%
Federal Agricultural Mortgage Corporation	1,008,790	2.1%
Federal Home Loan Mortgage Corporation	797,490	1.6%
Total	\$ 48,436,490	100.0%



Special Foundation Initiatives

School-Based Health Centers (SBHCs)

During the Spring of 2024, a new school-based health clinic was opened at Ouachita Parish High School in Monroe through prior year funding assistance to CommuniHealth Services, Inc. (CHS).

For 2024, \$150,000 was provided to CHS to upgrade the school-based health center at Downsville Charter School and expand the full-service community health clinic.



OPHS school-based health clinic

In addition, three new school-based health clinics were opened in Richland Parish through \$135,000 awarded to HSD #1B Richardson Medical Center in Rayville. These clinics, including medical and behavioral health services, are located at Start Elementary, Rayville Elementary, and Holly Ridge Elementary.

Also in Richland Parish, \$15,000 was awarded to HSD #1A Richland Parish Hospital in Delhi to expand mental health services at four school-based health centers, including additional trauma therapy certification for mental health professionals.



School-based health centers (SBHCs), located on school campuses, provide access to licensed, professional health providers including behavioral health counselors. Some clinics also have dental hygiene services on campus or through mobile units.

Because the clinics provide services on the school campus, families and parents do not have to transport their children or youths off campus to get services or leave their work setting to do so. Also, they do not incur any out-of-pocket expenses.

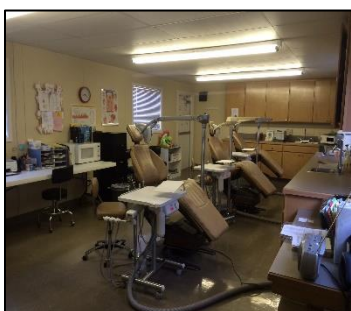
There are now 16 SBHCs on school campuses in Morehouse, Ouachita, Richland, and Union Parishes. It is the Foundation goal to help establish at least one school-based health center in each parish in the Service Area, collaborating with local providers and hospitals, school boards, and federally qualified health centers.

Dental Hygiene Clinics

Within the ongoing Dental Hygiene Initiative, and in partnership with the ULM Dental Hygiene Program, \$50,128 was funded for three clinics in 2024.

This initiative includes dental hygiene services at a clinic at Riser Elementary/Middle Schools in West Monroe, at the clinic located on-campus at ULM, and on the ULM mobile dental hygiene unit (MDHU). These clinics provide services as well as teaching environments for the ULM program.

Riser School-Based Dental Hygiene Clinic



There are 3 patient chairs at the Riser clinic where senior students provide services and gain clinical experience.

During 2024, \$22,978 was funded for an instructor, supplies, and equipment.



ULM On-Campus Dental Hygiene Clinic



The clinic at ULM is a teaching setting for the students in the curriculum through dental hygiene services for the community while professors plan, advise, and oversee the services.

During 2024, \$10,150 was provided to support this clinic.



Mobile Dental Hygiene Unit (MDHU)

In 2024, \$17,000 was funded for the mobile unit providing dental hygiene care. During that year, the unit was parked at the Ouachita Parish High School in spring, the ULM campus for summer, and at Woodlawn Elementary School in West Monroe for fall.



The mobile dental hygiene unit includes dental chairs, X-ray, and sterilization equipment.

Funding provides for an instructor, van maintenance, and updated equipment.

Grants Awarded

The Board of Directors approved a grant cycle that opened in April 2024 with all applications submitted by May 2024. The priorities and focus identified for the grant cycle included healthy lifestyles, access to healthcare, special needs of children and youth, suicide prevention/intervention, dementia/Alzheimers, and creative or innovative new programming for health and well-being. Awards were approved at the August 2024 Board meeting. A total of \$632,534 was awarded to qualifying organizations, as compared to \$348,127 in 2023.

Ascent Health – \$10,000



As a pilot project, funding was provided for Mangham High School to update the drumline equipment to support students in the performance arts areas, to improve academic performance, and to support better mental health.

The school program experienced a waiting list of students who wanted to participate after seeing the excitement and opportunity.

Boys and Girls Clubs of North Louisiana – \$21,150

As support for clubs in Ouachita and Morehouse Parishes, and to expand in Monroe, funding provided the addition of student mentors as staff. As the Monroe sites negotiated implementation, the student mentors relocated to other sites to ensure supportive ongoing programming.



Bright Star Ranch, Inc. – \$5,745

Funding was provided to purchase a specialized piece of equipment, a stationary Equicizer, or mechanical horse, for those who could not mount the horses at the ranch.

Elderly patients and others, some with mental health challenges, participated in the program and experienced improved mood and feelings of being in a safe space.



Children's Coalition for NELA – \$90,000

Continuation of the Signs of Suicide programming, supported by the Foundation grant, ensured that more students and staff in more schools received the education.



Funding supports the specialized mental health professionals and educators who provide the training and sessions. During 2024, over 8,000 students and staff were trained in Morehouse, Ouachita, Richland, and Union Parishes. Relationships in Lincoln Parish were initiated for implementing the programming in those schools.

City of West Monroe Police Department – \$13,708

An all-terrain emergency vehicle for event access and law enforcement presence was provided through a grant to the police department.

Officers were able to reach sites or situations in a safe and timely manner. Transport was provided for the injured or to allow more interaction with citizens.



CommuniHealth Services, Inc. – \$13,300

So that services for speech language pathology could be expanded in the full-service medical clinics in Morehouse and Ouachita Parishes, a grant was awarded to acquire equipment for autism screenings.

HSD #1 Franklin Parish dba Franklin Medical Center – \$15,149

To prepare for a program for telehealth physician training, and to expand rural physician services, funding was provided to add ICU supplies and equipment.



Jackson Parish Schools –\$6,000

Dental services by dentists and dental hygienists in a mobile unit, Miles for Smiles, were funded for schools in Jackson Parish. The school system contracts with the providers for services, and access for students has improved not only dental health but also academic attendance and performance.

LA Emergency Response Network (LERN) – \$15,000

Education for first responders and ER caregivers from NELA parishes was funded in this grant. This specialized training, provided with support from ULM Kitty Degree School of Nursing, Ouachita Fire Department, Ochsner LSU Monroe, and LERN, with Black Gold Farms as the host site, received positive feedback and ensured appropriate and immediate clinical knowledge and response to trauma and burn-related emergencies.



Life Choices Pregnancy Resource Center dba LC Center – \$22,000

Funding for the Center to hire medical professionals for pregnancy support services on the mobile unit was provided to ensure that rural parishes and populations had access to needed services.

LSU AgCenter –\$12,314

To expand literacy and physical fitness, a pilot project was funded to provide stationary bikes with reading desks at libraries, school settings, and other agencies. The LSU AgCenter agents provided programming and support in the settings to encourage participation.

Both students and adults enjoyed the opportunities to have more fun and participate in reading programs. Other settings requested access and equipment for future implementation based on community interest and participation.



Mercy Medical Health Center – \$42,000

Funding was provided to assist in the purchase of prescription dispensing equipment for automated medication provisions and to improve patient and medication safety while reducing medication errors.



Ochsner/LSU Monroe Medical Health Center – \$10,947



A trauma education course for rural hospitals and emergency personnel was funded.

The education included evidence-based programming taught by trauma medical clinicians.



Ouachita Council on Aging – \$15,000

Professional instructors for nutrition, fitness, and health education were provided for seniors through a grant to the senior center on Ferrand Street in Monroe.

Participation in the classes helped those with special dietary needs or clinical diagnoses to receive focused assistance.



Northeast Louisiana Children's Museum – \$100,000

Assistance to relocate the museum and provide a medical gallery for interactive children programming was provided through a grant to the museum. Naming rights for the gallery and Foundation involvement in planning the components in the space are included in the project.

Pinnacle Family Health, Inc. – \$8,471

Assessment kits for ADHD testing were purchased to expand services for families and children. The program is overseen by a clinical psychologist and incorporates treatment and medication interventions.

Behavioral health components for the program were set up to ensure appropriate and effective service delivery.



Seeker Springs – \$5,000

The Team Up program was expanded to Richland and Franklin Parishes, with interactive group sessions, youth activities, and the ropes course. Certified facilitators ensured appropriate programming for the sites.



St. Francis Medical Center, Inc. – \$15,000

A pilot program for community case management with Beacon Community Connections was expanded based on previous project successes. Gaps in medical and social services for patients were addressed in supportive interactions to ensure access to care while also addressing the impact on ER admissions for the populations served. Additionally, more efficient utilization of hospital resources was realized.



The Arc of Ouachita (ARCO) – \$30,000

Funding to support the RN professional components for the client population and required services for the agency was provided to ensure continued delivery of care within reasonable financial goals.

The Center for Children and Families, Inc. – \$50,000

A grant to support the professional mental health support services for children suffering from crisis-related trauma was awarded to the Center. Large cuts in state funding have contributed to challenges in meeting ongoing programming for these much-needed services.



Town of Farmerville – \$25,000

A new Teen Center and music performance space was funded at the location for the recently implemented Boys and Girls Club. Supplies and equipment were included for outfitting the spaces for the computer lab, homework room, game room, and kitchen area in the building.

ULM School of Allied Health – \$11,400

In the second phase of this funded program for dementia and Alzheimers support, more education and simulation experiences were provided to clinical professionals, community, and families and caregivers.

Local hospitals participated through their medical residency programs to expand the knowledge and clinical interventions for those diagnosing the diseases and providing care.



Requests to expand this initiative have contributed to opportunities to expand the impact and broaden the involvement across several areas of the referral and care settings.

ULM School of Business and Social Studies – Psychology Program – \$6,500

Equipment for telehealth and digital literacy for seniors was funded to assist in providing education for seniors and provide interactive social sessions. These sessions were taught by ULM students to encourage positive support and prevent loneliness through the project focus.



ULM The GERO Institute – \$13,600

Education, mentoring, and training sessions were provided for caregivers of those with dementia and Alzheimers disease and taught by mental health and medical professionals within this funded project.

Supportive social media and marketing tools were developed to assist in awareness and knowledge.

Union General Hospital – \$10,000

A bladder scanner was purchased for the hospital to reduce invasive procedures, assist in medical diagnoses and treatment, and support the patient population with better care while improving diagnostic capabilities.



Village of Grayson – \$12,750

Fitness equipment including accessible park equipment for physically challenged children was included in a project to provide more enhancements to the community walking trail and park.

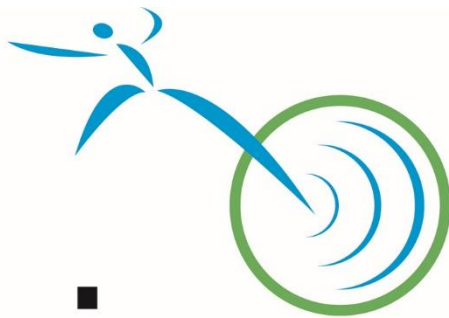
Zion Helping Hands, Inc. - \$7,500

To assist in ensuring that food availability and access were provided to families and seniors in Morehouse Parish, continued funding was provided to the agency. More equipment, storage freezers, and transport dollies were needed for the large numbers that are served through the food distribution program.

This agency is a designated food pantry with the Food Bank of NELA.



(Two grants totaling \$45,000 were returned due to the inability to complete projects as proposed.



Livingwell
FOUNDATION

Living Well Foundation

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