



A R e p o r t t o t h e C o m m u n i t y

SAN ANGELO HEALTH FOUNDATION  
SAN ANGELO, TEXAS

2009

# MISSION STATEMENT

Our mission is to enhance the quality of life for the people of the San Angelo area

## 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 twelve 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.

# TABLE OF CONTENTS

2	Statement of Purpose
3	Table of Contents
5	Letter from the Chairman
6	Foundation Profile and Vision Statement
7	Trustees and Staff of the Foundation
8	2009 Grant Activity
13	2009 Grants by Program Area
13	Grants by Program Area 1997 – 2009
15	Advisory Trustees
17	Statement of Financial Condition
18	Grant Application/Contact Information
19	Credits



*Foundation grants provided funds for a fire hall, a new brush truck and rescue tools to volunteer fire fighters serving throughout the Concho Valley.*



“Few people could have guessed that from the sale of one hospital could come so much good.” Written in January 2000 for the San Angelo Standard Times, the statement holds true today. The ensuing years have produced more milestones for the San Angelo Health Foundation – grants exceeding \$32.5 million, dedication of permanent Foundation offices in the Visitor Center, and numerous Foundation initiatives benefitting area non-profits and community organizations.

Simply stated, we strive through Foundation initiatives and the grantmaking process to ensure opportunity and hope, particularly for those with limited resources and alternatives. In 2009 alone San Angelo Health Foundation committed \$2,307,507 to area non-profits. Significant grants benefitted the San Jacinto School-based Health Clinic, a new residential hospice program, river development projects in cooperation with the City of San Angelo, new facilities for a pregnancy help center and program funding for non-profits addressing mental health needs. Other 2009 awards detailed in this report provided facilities and equipment for emergency response and educational organizations, scholarships for higher education and capital improvements for animal protection programs.



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

T. Richey Oliver,  
Chairman of the Board  
of Trustees

Our ability to continue this rewarding work and strengthen our commitment to the San Angelo area relies on well-managed resources. The investment strategy adopted by the Foundation provides for stable long-term growth consistent with our planned grantmaking activities. The Trustees nurture existing relationships and foster new ones with our health care professionals, educators, nonprofit managers, community leaders and social service workers as we face a constantly changing and challenging environment.

I am honored to have served as Trustee since the Foundation was formed on the Audit, Executive, Investment, Grants and Nominating Committees, and as Chairman of the Board for the past four years. I look forward to serving with my long time friend and incoming Chairman Dr. Rob Patyrak. His caring and capable leadership will no doubt advance our overriding goal of improved quality of life for our citizens. Area organizations are encouraged to contact our foundation staff about funding for worthy projects.

# LETTER FROM THE CHAIRMAN

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.

# FOUNDATION PROFILE

6

## 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.



*Grant awards totaling \$1,495,146 over thirteen years to Esperanza Health & Dental Centers provide comprehensive primary health care services to medically underserved and indigent residents.*



# TRUSTEES & STAFF - 2009

## ***Officers***

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

## ***Trustees***

Marilyn Aboussie  
George Alexander  
Devin Bates  
James P. Cummings  
Rick DeHoyos  
O. Sterling Gillis III, M.D.  
Sande Vincent Harrison  
Karen Pfluger  
Joanne Rice  
Joe B. Wilkinson, M.D.

## ***Senior Trustees***

John Mark McLaughlin  
F. L. "Steve" Stephens

## ***Staff***

Tom Early, President  
Vicki Ford, Administrative Officer

<i>Recipient and Purpose</i>	<i>Commitments 2009</i>	<i>Payments 2009</i>	<i>Future payments</i>
<b>Angelo State University</b> Funding to implement mental health services at San Jacinto School-based Health Clinic	160,700	0	160,700
<b>Ballinger Memorial Hospital District</b> Ballinger, Texas Electronic Medical Records system for Ballinger and Runnels County hospitals	0	180,000	0
<b>Baptist Memorials Ministries *</b> Rotary House of Hope residential hospice program	100,000	100,000	0
<b>City of Junction</b> Junction, Texas Renovation of community swimming pool	0	40,000	0
<b>City of San Angelo</b> Construction of new Rio Concho Sports Complex and Community Park	0	125,000	0
<b>City of San Angelo</b> Lighting for a new public tennis facility	131,800	131,800	0
<b>City of San Angelo **</b> River Development project	570,000	0	570,000
<b>City of San Angelo – Community Development Division</b> Fund roof repair for low-income families	100,000	100,000	0
<b>Concho Valley Home for Girls/Children’s Emergency Shelter</b> Purchase of a van	16,000	16,000	0
<b>Cornerstone Christian School</b> Improvements to their new gymnasium	125,000	125,000	0
<b>Critter Shack Humane Society of Menard</b> Menard, Texas Fenced enclosure	14,500	14,500	0
<b>Esperanza Health &amp; Dental Centers</b> Professional consultant to assist in identifying resources to improve access to health care	10,000	10,000	0
<b>Hospice of San Angelo</b> Upgrade computer systems	31,215	31,215	0

# GRANT ACTIVITY 2009



<i>Recipient and Purpose</i>	<i>Commitments 2009</i>	<i>Payments 2009</i>	<i>Future payments</i>
<b>House of Faith</b> Higher education scholarship program for qualifying House of Faith participants	0	123,000	754,500
<b>Irion County EMS **</b> Training facility for their Emergency Medical Service	0	50,000	0
<b>James Phillips Williams Memorial Foundation</b> Speaker for teachers' conference	4,458	4,458	0
<b>Junior Achievement of West Texas**</b> San Angelo, Texas Support to continue programs in San Angelo schools	0	1,325	0
<b>Lake Ivie Volunteer Fire Department</b> Expansion of existing fire hall	50,000	50,000	0
<b>Meals for the Elderly</b> Office furniture, computer equipment and software consultant	6,000	0	6,000
<b>Placid Community Volunteer Fire Department</b> New brush truck	69,000	69,000	0
<b>Pregnancy Help Center of the Concho Valley*</b> Renovation of their new facility	200,000	200,000	0
<b>Runnels County Senior Center</b> Ballinger, Texas Renovation of the Ballinger Senior Center	0	73,847	0
<b>Rust Street Ministries</b> New trailer for their clothing ministry	25,284	25,284	0
<b>Salvation Army</b> Purchase of a delivery truck	35,046	35,046	0
<b>Samaritan Pastoral Counseling Center</b> Employee insurance, client assistance and clinical director	39,875	30,750	9,125
<b>San Angelo Area Foundation</b> Honorarium for Advisory Trustee George Alexander	10,000	10,000	0



*Renovation of the Runnels County Senior Center provides for the social welfare and nutritional needs of senior citizens in Ballinger, Texas.*

<i>Recipient and Purpose</i>	<i>Commitments 2009</i>	<i>Payments 2009</i>	<i>Future payments</i>
<b>San Angelo Area Foundation</b> Honorarium for Advisory Trustee Sterling Gillis	10,000	10,000	0
<b>San Angelo Area Foundation</b> Match funds to establish a "Future Fund"	25,000	0	25,000
<b>San Angelo Independent School District Athletic Department</b> Construction of a new field house	0	125,000	0
<b>San Angelo Lions' Charities</b> Special eye screening camera and software	5,000	5,000	0
<b>Schleicher County Wellness Foundation *</b> Eldorado, Texas Construction of a community wellness center	0	125,000	0
<b>Sterling County EMS **</b> Sterling City, Texas Construction of new building to house ambulances	25,000	0	25,000
<b>Texas Tech Foundation, Inc.</b> Establish a College of Nursing and Allied Health at Angelo State University	0	140,000	0
<b>Tom Green County Library</b> Library renovation and expansion project	0	437,500	0
<b>Tom Green County Library</b> Furniture, fixtures and equipment	500,000	0	500,000
<b>Wall Volunteer Fire Department</b> Rescue tools	3,628	3,628	0
<b>West Central Texas Feeding Team</b> Equipment to establish a Disaster Relief Team	25,000	25,000	0
<b>West Texas Rehabilitation Center</b> New Electronic Medical Records system	0	250,000	0

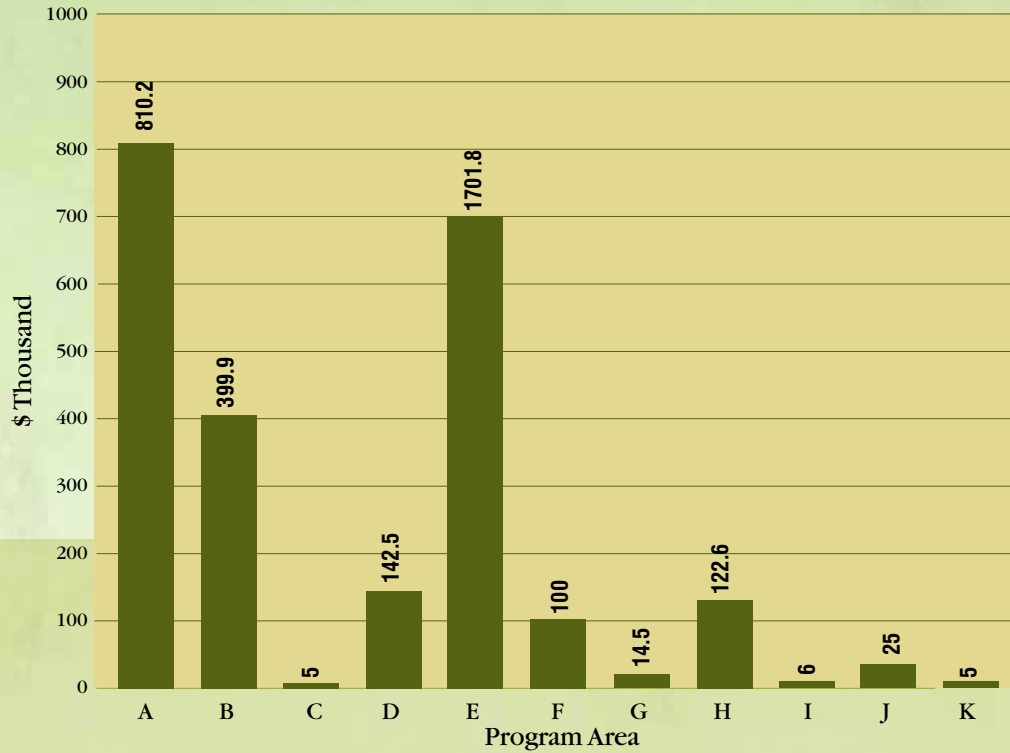
\* The generous gift of Myrtle Williams in honor of her parents, William Harden Williams and Mary Eveline Holmes Williams, made this bequest through the San Angelo Health Foundation possible.

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



*A grant to the Schleicher County Wellness Foundation in memory of Myrtle Williams offers residents the opportunity for a healthy diet, regular exercise and access to a physical therapy room.*

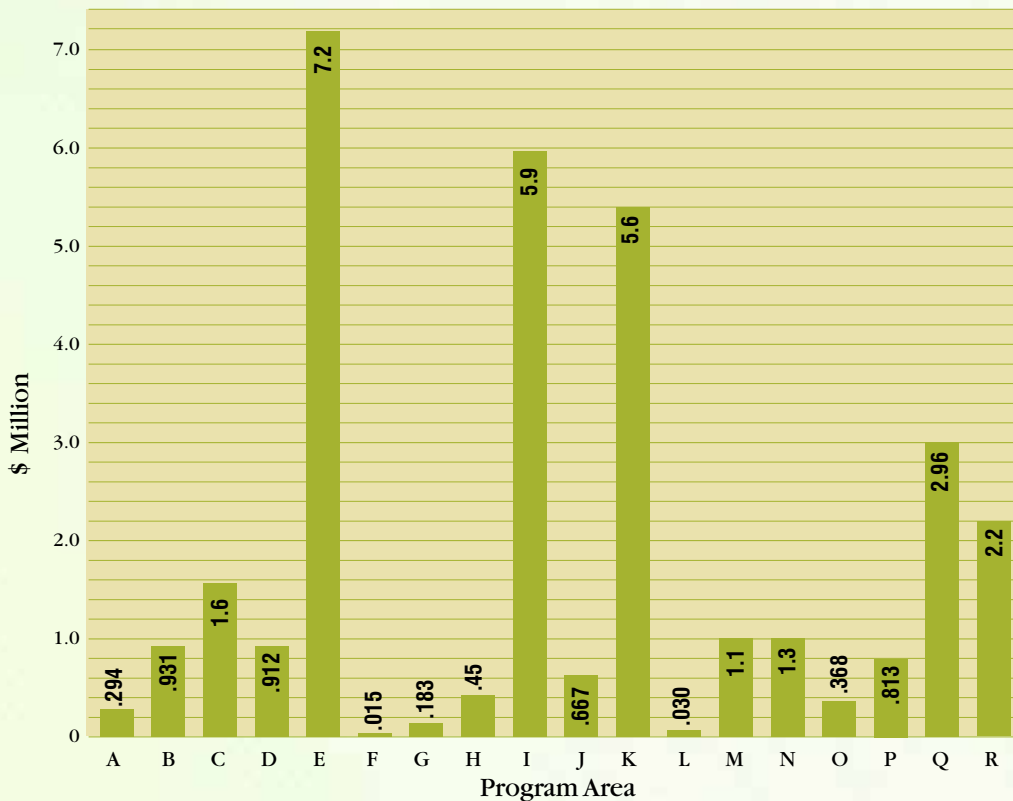
## 2009 Grants by Program Area Total Commitments \$2,307,507



- A. Educational institutions and related activities
- B. Health-general & rehabilitative
- C. Youth Development
- D. Human services-other/multipurpose
- E. Recreation, leisure, sports, athletics
- F. Housing/shelter
- G. Animal-related activities
- H. Public safety/disaster preparedness & relief
- I. Food, nutrition, agriculture
- J. Philanthropy and voluntarism
- K. Community improvement/capacity building

# GRANTS BY PROGRAM AREA

## Grants by Program Area since inception 1997-2009 Total Commitments \$32,491,946



- A. Animal related activities
- B. Arts, Culture, humanities
- C. Community improvement/capacity building
- D. Disease/disorder/medical disciplines (multipurpose)
- E. Educational institutions and related activities
- F. Employment/jobs
- G. Environmental quality, protection & beautification
- H. Food, nutrition, agriculture
- I. Health-general & rehabilitative
- J. Housing/shelter
- K. Human services-other/multipurpose
- L. Medical research
- M. Mental health, crisis intervention
- N. Philanthropy and voluntarism
- O. Public protection: crime/courts/legal services
- P. Public safety/disaster preparedness & relief
- Q. Recreation, leisure, sports, athletics
- R. Youth Development



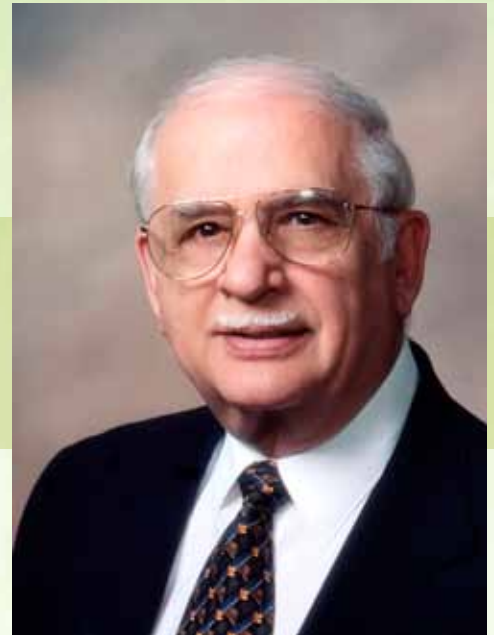


*Food and clothing are provided at no charge to needy children and families through Rust Street Ministries.*

In an effort to assist deserving young students pursue higher education following high school graduation, two scholarships have been established at Angelo State University of San Angelo, Texas, honoring the years of board service by George Alexander and Dr. O. Sterling Gillis, III. Both gentlemen have served on the Foundation board since its inception and agreed to continue in the capacity of Advisory Trustees.

# ADVISORY TRUSTEES

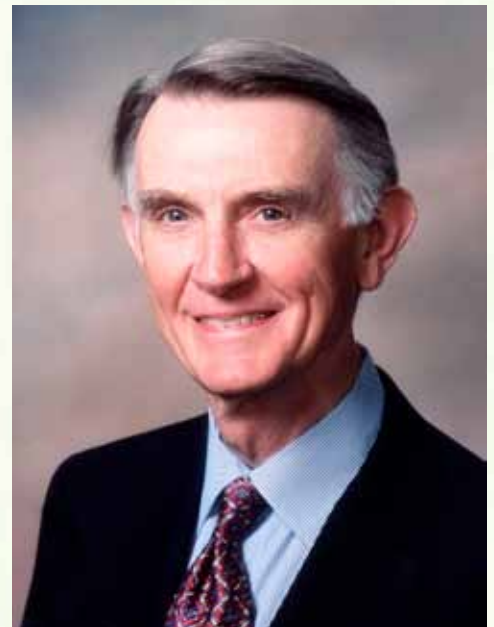
Appointed as a Trustee of Angelo Community Hospital in 1978 and as Trustee of the resulting Foundation in 1995, George Alexander served of Chairman of the Board of Trustees of the San Angelo Health Foundation and Chairman of the River Development Committee during the genesis of the Visitor Center project on the Concho River in downtown San Angelo. As a tireless advocate for San Angelo and West Texas, George forged relationships with community leaders and throughout our state through his involvement with Habitat for Humanity, Home Builders Association – Texas, Rio Concho Retirement Centers and Salvation Army. George is remembered for his uncanny sense of vision and methodical approach to complex issues. The Foundation has benefited greatly from his contribution and service on our Executive, Grants, Investments and Nominating Committees. A scholarship to be awarded each year has been endowed by the San Angelo Health Foundation in his honor.



Mr. George Alexander

Sterling Gillis, M.D. has served on the Foundation Board of Trustees since 1995 and prior to that, on the Angelo Community Hospital Board since 1988. Certified by the American Board of Obstetrics and Gynecology, Dr. Gillis has practiced in San Angelo since 1963. He retired from full time practice in 1998, but continued to assist in surgery. For the past decade, Dr. Gillis has served as a physician supervisor over those providing care for the uninsured and underinsured women and patients at the Esperanza Health & Dental Centers.

Dr. Gillis was President of the Tom Green Eight County Medical Society in 1977 and was awarded the Golden Cane Award in 1998 for his outstanding contributions to medicine. He served as Chief of Staff of Angelo Community Hospital in 1979. He worked closely with Planned Parenthood for many years and was one of the founding members of the Moon Lectureship series at Angelo State University. He has been a long-standing member of First Presbyterian Church where he served as an Elder. We honor Dr. Gillis for his service on our Grants, Investments, River Development and Angelo State University Lectureship Committees. A scholarship to be awarded each year has been endowed by the San Angelo Health Foundation in his name.



Dr. O. Sterling Gillis, III





*Over 200 students representing forty area churches attend grades K through 12 each year in an environment where God and education come together at Cornerstone Christian School.*





# STATEMENT OF FINANCIAL POSITION

## Statement of Financial Position

DECEMBER 31, 2009

ASSETS		
Cash and cash equivalents		\$ 199,973
Investments, at market		46,276,403
Land, building and equipment & other net		5,020,051
TOTAL ASSETS		<u>\$ 51,496,427</u>
LIABILITIES and NET ASSETS		
Liabilities		
Grants payable		\$ 1,555,326
Accounts payable		133,241
Total Liabilities		<u>1,688,567</u>
Net Assets		
Unrestricted		49,549,737
Temporarily restricted		258,123
Total Net Assets		<u>49,807,860</u>
TOTAL LIABILITIES and NET ASSETS		<u>\$ 51,496,427</u>

Grants totaling \$845,000 are approved but not accrued in the above Statement of Financial Position because they are conditioned on the occurrence of future events.

# STATEMENT OF ACTIVITIES

## Statement of Activities

FOR THE YEAR ENDED DECEMBER 31, 2009

UNRESTRICTED REVENUE AND SUPPORT		
Interest and dividends		\$ 2,467
Realized Investment loss (net of fees)		(1,593,911)
Unrealized investment gain		11,303,496
Oil and gas income		149,376
Other income		108,919
TOTAL UNRESTRICTED REVENUE and SUPPORT		<u>9,970,347</u>
UNRESTRICTED EXPENSES		
Program and administrative costs		736,798
Total Expenses		<u>736,798</u>
INCREASE IN NET ASSETS BEFORE GRANTS		9,233,549
Grants		2,025,476
INCREASE IN NET ASSETS		<u>\$ 7,208,073</u>

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:

## GRANT APPLICATION INFORMATION

San Angelo Health Foundation  
Post Office Box 3550  
San Angelo, TX 76902-3550

325.486.0185  
FAX 325.486.1125  
email: [sahf.tx@sahfoundation.org](mailto:sahf.tx@sahfoundation.org)  
426 West Avenue B  
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)



# SPECIAL THANKS

Photographs by Patrick Dove courtesy of the Standard Times: cover and page 4

Photos courtesy of Joanne Rice: pages 6, 7 and 14

Photo courtesy of Vicki Ford: page 10

Photo courtesy of Schleicher County Wellness Center: page 12

Photo courtesy of Cornerstone Christian Church: page 16

Trustee portraits: Tom Clemens

Graphic Design: Henry Niño

Printing: Company Printing

Public Relations Chairman: Karen Pfluger

Editor/Contributing Writer: Vicki Ford



## San Angelo Health Foundation

Physical address:

426 West Avenue B

San Angelo, TX 76903

(325) 486-0185

FAX: (325) 486-1125

Mailing address:

Post Office Box 3550

San Angelo, TX 76902-3550

[sahf.tx@sahfoundation.org](mailto:sahf.tx@sahfoundation.org)