2013 ANNUAL REPORT
CELEBRATING TEN YEARS

WHAT'S NEXT

MEDICA FOUNDATION
ABOUT THE MEDICA FOUNDATION

Our mission is to fund community-based initiatives and programs that support the needs of Medica’s customers and the greater community by improving their health and removing barriers to health care services.

TEN YEARS OF GIVING

This annual report celebrates ten years of giving by the Medica Foundation.

Over the years Medica Foundation grants totaling $211 million have supported more than 750 organizations in our community, with awards ranging from $500 to $5 million.

These grants supported community efforts designed to improve access to services, reduce disparities in health care and promote effective use of the health care system. While funding priorities have varied from year to year, the foundation has consistently focused on programs addressing behavioral health, early childhood health, disabilities and prevention.

About two-thirds of our funding goes to one-year program grants averaging $30,000–$50,000, often serving as seed money to help new programs get off the ground. We have also funded multi-year grants to support projects that require a longer term investment to develop and implement. We are pleased that our grants have frequently helped generate the additional funding needed to grow and sustain community programs.

In 2010, we responded to the financial downturn by awarding additional grant dollars to nonprofits outside of the Minneapolis/St. Paul metro area. Through 2013, we provided more than 100 core mission grants, totaling half a million dollars, to smaller nonprofit organizations with health related missions.

About 15 percent of our funding is devoted to helping our nonprofit community partners address general community needs. We know that our ability to help our members is enhanced by the work these organizations do to increase access, improve communication and outreach, and reduce disparities.

We are thankful for all the work our partners have done over the past ten years and look forward to supporting future efforts to improve the health and well being of our community.

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BEHAVIORAL, SOCIAL AND EMOTIONAL HEALTH

Our community needs programs to help people at all ages and stages of life. We support programs that address gaps in service, integrate physical and mental health care, or promote the social and emotional development of our youngest children.

ENGAGING THE COMMUNITY

Mental Health Resources

Intensive case management helps people with serious mental illness improve their health and lives. Many people with mental illness are also challenged by substance abuse, disabilities, low income and lack of insurance. They may have difficulty establishing relationships, following medication plans, and maintaining a job and stable housing. A three-year strategic grant supported developing new tools that mental health specialists used to provide personalized support for individuals with considerable challenges, helping them avoid repeat hospitalizations, learn to manage their illness, and access community resources to maintain a more stable life.

mhresources.org

“This grant allowed us the time to evaluate processes and refine the program. It allowed us to demonstrate some significant results in helping our clients learn how to use the health care system and improve the quality of their lives.”

– Kathy Gregersen, Executive Director

92% of clients avoided mental health emergency room visits or hospitalization due to a mental health crisis.

72% reduction in inpatient care costs.

50% reduction in overall medical spending.
KEEPING FAMILIES TOGETHER

Washburn Center for Children

Intensive early intervention changes outcomes for families whose children struggle with mental health issues. This project supported expanding an evidence-based, best practices program offering intensive in-home services to families whose children had a high risk of being removed from their homes and placed in residential treatment or an inpatient hospital program. In addition to individual and family counseling, the program offered parent education and coordinated services with teachers, health care providers, juvenile justice and child welfare workers.

washburn.org

“...When children experience mental health challenges, the entire family faces challenges and needs support. Intensive in-home services support the stability of the family and help them avoid out-of-home placements.”

– Steve Lepinski, Executive Director

DEVELOPING CHILDREN’S ASSETS

YWCA Duluth

Early intervention helps children with mental health issues improve their behavior and school readiness. Experiencing homelessness, lack of medical care, neglect and exposure to addiction and violence are all factors that can prevent young children from developing essential social and emotional skills. This project applied the Circle of Security® approach to healthy child-parent interaction. The program provided new ways for both parents and staff to understand and respond to a child’s needs and behavior. Improving the capacity of children to bond with caregivers, play well with other children, handle change and solve problems are assets that follow them to school and throughout their lives.

ywca.org

HELPING MOTHERS AND BABIES GROW

Hennepin Health Foundation

Addressing mental illness helps keep families together. A pilot program, including a telephone hotline and hospital program, helped stabilize women whose mental illness made it difficult to connect with and care for their babies. In the most serious cases, mothers entered a day-hospital with their children to receive help with mental health issues and learn key parenting skills. This innovative program is one of only three in the United States.

hcmc.org

374 patients called the HopeLine.

93% had decreased mental health symptoms.

93% improved their understanding of how to make their child feel safe and secure.
HEALTHY LIFESTYLES FOR PEOPLE WITH DISABILITIES

People with disabilities face unique challenges in accessing health care, particularly dental care. Lack of dental care can lead to pain, infection, loss of teeth and other serious health issues. Access to preventive health and dental services helps people with disabilities enjoy their best possible health.

BRINGING SMILES TO THOSE IN NEED

Apple Tree Dental Rochester

A new training program for dentists, dental staff and caregivers, along with new legislation, is helping southeast Minnesotans with severe physical and cognitive disabilities receive the dental care they need. This project focused on delivering services on-site at a Rochester area group home, demonstrating care strategies and daily care techniques that have now been adopted by caregivers and intervention specialists in group homes and long-term care facilities statewide. The positive results of this program helped persuade Minnesota’s state legislature to restore dental benefits for people with disabilities.

appletreedental.org

HELPING PEOPLE WITH DISABILITIES STAY HEALTHY IS A CHALLENGE FOR THEIR FAMILIES, CAREGIVERS AND DENTAL PROFESSIONALS. SUPPORT FROM THE MEDICA FOUNDATION IS HELPING ALL OF US BECOME MORE EFFECTIVE IN ACHIEVING SUCCESSFUL DAILY MOUTH CARE Routines.

– Dr. Michael Helgeson, CEO

STATEWIDE IMPACT

Minnesotans with disabilities and frail elders received dental care in the long-term care facilities where they live.

4,000

clinical staff were trained to serve people with disabilities.

90

caregivers and intervention specialists were trained to provide daily mouth care.

811

adults with severe disabilities in a Rochester group home received care during 122 visits.

51

Minnesotans with disabilities and frail elders received dental care in the long-term care facilities where they live.
APPROPRIATE USE OF HEALTH CARE RESOURCES

Teaching people how to access and use the most effective health care resources for their needs helps them avoid using emergency services inappropriately and reduces hospital readmissions.

ENSURING LONG-TERM DENTAL CARE SOLUTIONS

Northern Dental Access Center

Patients going to the hospital emergency room with dental pain or infection typically receive antibiotics and pain medication, but may not have access to follow-up care to resolve the primary cause of their dental problems. A program providing 6,000 dental exams each year to low-income patients in northern Minnesota, received support to try two new alternatives: 1) calling high-risk patients and encouraging them to complete treatment, and; 2) reserving 30 percent of appointment time for walk-in patients needing urgent and emergency dental care. Because of innovative programs like this, Northern Dental Access Center was recently honored with one of three national Community Partnership Awards.

Patients reengaged and completed needed treatment.

When we opened, we were unable to accommodate emergency patients. Now we can integrate those needs within our existing structure.”

– Jeanne Edevold Larson, Executive Director

1,426 emergency exams were completed for 1,189 patients.

104 patients reengaged and completed needed treatment.

23% reduction in the average number of patients who reported visiting the ER for dental pain.

northerndentalaccess.org
**CORE MISSION SUPPORT**

Proven community programs need resources to continue their good work. We support health-focused programs of organizations within Medica’s regional and rural service areas in Minnesota, Western Wisconsin, North and South Dakota.

**HELPING SENIORS LIVE AT HOME**

The Community Partners
Two Harbors Living at Home Program

Caregiver counseling, caregiver respite and free rides to medical appointments helped frail seniors in northeast Minnesota continue living at home. Ninety-six percent of seniors in this program improved or maintained their health.

communitypartnersth.org

**KEEPING SENIORS HEALTHY**

South Central Adult Services

The Prescription Assistance Program helped seniors in northwest Minnesota and North Dakota maintain their health, despite lack of health insurance, prescription coverage, coverage for specific medications, or falling into the Medicare Part D coverage gap.

southerncentralseniors.org

**PROVIDING HOPE TO THOSE IN NEED**

National Alliance on Mental Illness (NAMI) – Southeast Minnesota

This program provided education, research and advocacy on suicide prevention and other mental illnesses, which helped family members and individuals in three southeast Minnesota counties: Olmsted, Dodge and Mower.

namisemn.org

**STABILITY**

1,406

hours of respite care and 600 hours of driving services were provided by volunteers.

**HELPING SENIORS LIVE AT HOME**

$4.2

million dollars in prescription cost savings.

**KEEPING SENIORS HEALTHY**

3,349

students learned about the “be a friend” suicide prevention program.
During 2013, the Medica Foundation awarded grants totaling almost $1.4 million to 96 projects that will be completed in 2014.

**MEDICA FOUNDATION FINANCIAL SUMMARY**

<table>
<thead>
<tr>
<th>Projects</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Behavioral Health</td>
<td>$400,000</td>
</tr>
<tr>
<td>Early Childhood Health</td>
<td>$289,132</td>
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<tr>
<td>General Health Improvement</td>
<td>$244,940</td>
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<tr>
<td>Alzheimer's Disease</td>
<td>$100,000</td>
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<tr>
<td>Organizational Core Mission Support</td>
<td>$135,910</td>
</tr>
<tr>
<td>Sustainable Resources</td>
<td>$135,910</td>
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<tr>
<td>Total</td>
<td>$1,393,972</td>
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**ASSETS**

<table>
<thead>
<tr>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and Investments of Fortune</td>
<td>$26,544,818</td>
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<tr>
<td>Other</td>
<td>$28,193,833</td>
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<td><strong>TOTAL</strong></td>
<td>$26,585,242</td>
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**LIABILITIES AND NET ASSETS**

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<thead>
<tr>
<th>Liabilities</th>
<th>2013</th>
<th>2012</th>
</tr>
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<tbody>
<tr>
<td>Unrestricted Net Assets</td>
<td>$1,653,194</td>
<td>$1,793,158</td>
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<tr>
<td>Temporarily Restricted Net Assets</td>
<td>$24,932,048</td>
<td>$26,400,678</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>$26,585,242</td>
<td>$28,193,836</td>
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**REVENUE**

<table>
<thead>
<tr>
<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Contribution from Affiliate</td>
<td>$0</td>
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<tr>
<td>Net Investment Income</td>
<td>$322,663</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>$322,663</td>
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</table>

**EXPENSES**

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<thead>
<tr>
<th>2013</th>
<th>2012</th>
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</thead>
<tbody>
<tr>
<td>Administrative Expense</td>
<td>$408,880</td>
</tr>
<tr>
<td>Community Funding</td>
<td>$1,393,972</td>
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<tr>
<td><strong>TOTAL</strong></td>
<td>$1,802,852</td>
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</table>

**NET ASSETS AT BEGINNING OF YEAR**

<table>
<thead>
<tr>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>$26,400,678</td>
<td>$26,193,836</td>
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</tbody>
</table>

**NET ASSETS AT END OF YEAR**

<table>
<thead>
<tr>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>$24,932,048</td>
<td>$26,400,678</td>
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**GRANTS**

During 2013, the Medica Foundation awarded grants totaling almost $1.4 million to 96 projects that will be completed in 2014.

**BEHAVIORAL HEALTH**

- Center for Victims of Torture
- Comunidades Latinas Unidos
- En Servicio
- HealthEast Foundation
- Hennepin County
- National Alliance on Mental Illness - Minnesota
- Northeast Youth & Family Services
- St. Stephen’s Human Services, Inc.

**EARLY CHILDHOOD HEALTH**

- A Chance to Grow
- AmeriCorps H. O. W. Foundation
- Ascension Place
- Community Dental Care
- CornerHouse Interagency
- Child Abuse Evaluation
- and Training Center
- FamilyWise Services
- Greater Minneapolis
- Crisis Nursery
- Just Kids Dental Incorporated
- Simpson Housing Services
- West Central Initiative
- West Side Community
- Health Services

**GENERAL HEALTH IMPROVEMENT**

- African Challenges
- Corporation
- American Cancer Society
- American Heart Association
- American Lung Association - Minnesota
- American Red Cross
- Twin Cities Area Chapter
- Better Futures Minnesota
- Bolder Options
- Can Do Canines
- Charities Review Council
- Children’s Defense Fund
- Community Health
- Charities Minnesota
- Emergency & Community
- Health Outreach
- Face to Face Health
- and Counseling Services, Inc.
- Faith Community Nurse
- Network of the Greater
- Twin Cities
- Family Housing Fund
- Greater Twin Cities
- United Way
- Guild Incorporated
- Little Brothers - Friends of the Elderly
- Management Assistance
- Program for Nonprofits, Inc.
- March of Dimes
- Mental Health Association
- of Minnesota
- Minnesota Dental Foundation
- Minnesota Network of
- Hospice & Palliative Care
- Minnesota Public
- Health Association
- Minnesota Visiting
- Nurse Agency
- Nonprofits Assistance Fund
- Parents in Community
- Action, Inc.
- Partnership Resources, Inc.
- Peace Christian
- Reformed Church
- Senior Community Services
- State of Minnesota
- Stearns County
- Human Services

**ORGANIZATIONAL CORE MISSION SUPPORT**

- Big Brothers Big Sisters of Central Minnesota
- C.A.R.E. Clinic
- CentralCare Health Foundation
- Central MN Task Force on
- Battered Women
- Child Care Resource & Referral
- Family HealthCare Center
- Family Pathways
- Family Resource Center
- St. Croix Valley, Inc.
- Free Clinic of Pierce and
- St. Croix Counties
- HealthFinders Collaborative
- Isanti County Public Health
- Life House, Inc.
- Lutheran Social Service
- of Minnesota-Duluth
- Lutheran Social Service
- of Minnesota-St.Cloud
- Minnesota State University
- Moorhead
- Monticello Christian Social
- Services, Inc.
- North Dakota Caring
- Foundation, Inc.
- North Shore Health Care
- Foundation
- Northland Foundation
- Opportunity Matters
- Polk County Public Health
- Reach-Up, Inc.
- Rice County
- The Refuge Network
- Well Being Development
- West Central Industries, Inc.
- Women’s Health Center
- of Duluth, PA
- YMCA of Mankato

**ALZHEIMER’S DISEASE STRATEGIC GRANT**

- Metropolitan Area Agency
- on Aging

**PARTNERS**

- Lutheran Social Service of Minnesota-St.Cloud
- Minnesota State University Moorhead
- Monticello Christian Social Services, Inc.
- North Dakota Caring Foundation, Inc.
- North Shore Health Care Foundation
- Northland Foundation
- Opportunity Matters
- Polk County Public Health
- Reach-Up, Inc.
- Rice County
- The Refuge Network
- Well Being Development
- West Central Industries, Inc.
- Women’s Health Center of Duluth, PA
- YMCA of Mankato

**Medica Foundation Grant Partners**

- 2013
- 2014
- GRANT PARTNERS

**Medica Foundation Grant Partners**

- 2013
- Partners