SUPPORTING SENIORS AND CAREGIVERS IN THE COMMUNITY

WellMed® CHARITABLE FOUNDATION

2019 ANNUAL REPORT
Friends of the Foundation,
What a year we had in 2019. We welcomed 7,304 new members to our 11 senior center locations across Texas and Florida. Every day, our members enjoy physical activity such as Zumba, strength training, or dance, enjoy or learn to make a nutritious meal, and build lifelong friendships through an array of offerings that improve their quality of life. I am so proud to say we have positively affected the lives of 43,379 members since our first senior center opened its doors in 2009.

Meanwhile, our caregiver programs continue to grow. Our Stress Busting program, for instance, is now offered in 16 states. Caregivers call in from around the world to the Caregiver Teleconnection. And our Caregiver SOS program delivers personal assistance to thousands of caregivers each year.

We also had an exciting opportunity to create a new, fun program for persons living alone with Alzheimer’s in San Antonio in partnership with the world’s first accessible theme park – Morgan’s Wonderland, as well as the UT Health Caring for the Caregiver Program and the Alzheimer’s Association. Through engagement and deployment of community health workers, we’ve seen how intervention can bring light to individuals who might otherwise be left in the dark.

It was also my honor and privilege to serve on the RAISE Family Caregiving Advisory Council at the request of the U.S. Department of Health and Human Services. It is a humbling opportunity to advocate and support caregivers at the national level.

As is always true, 2019 presented many opportunities for our WellMed employees to give back to our communities. WellMed employees volunteered 41,000 hours of their time, valued at almost $1 million, in giving back to our communities. In addition, employees donated nearly $1.19 million to charities across Texas and Florida.

When tragedy struck after a mass shooting in El Paso, the WellMed Charitable Foundation set up an emergency fund to support the community. In turn, we presented a donation of $575,000 to the El Paso Strong Fund in support of the community.

So far, this year has seen its share of challenges brought about by COVID-19. Older persons, especially those with underlying health conditions, have been at highest risk. We have been keenly aware of this and have put many measures in place to protect the health of our older patrons. It has also affirmed and emboldened the need for the WellMed Charitable Foundation and its mission to help older adults and caregivers in a manner that works for them during these difficult times.

We thank you for your continued support and look forward to touching many more lives in the future in the communities in which we live and serve.

With warm regards,

Sincerely,

GEORGE M. RAPIER III, M.D.
Chairman, WellMed Charitable Foundation

Friends and supporters,
As always, thank you for your support of the WellMed Charitable Foundation. You help us provide a better quality of life for thousands of older persons. The foundation also aids family caregivers who provide care to friends and family members.

Since 2006, the WellMed Charitable Foundation has been the philanthropic, giving partner of WellMed. The foundation makes it possible for WellMed, our physicians and employees to give back to the communities we serve.

In 2019, we served more than 43,000 older adults through our 11 senior centers. These older adults have access to no-cost activities that help improve their health and lives. This fits in with the larger mission of WellMed. As one senior center member noted: “I had both knees replaced. Since I’ve been coming to this center, I’m walking better and feeling better.”

More than 7,600 caregivers turned to us in 2019 for our no-charge Caregiver SOS, Stress-Busting and Caregiver Teleconnection programs. Through these programs, caregivers connected with professionals and with each other for advice and support.

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CAROL ZERNIAL
Executive Director, WellMed Charitable Foundation
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As you can see, there is never a lack of desire to serve at WellMed or at the WellMed Charitable Foundation. So many older persons and their caregivers need our help; we will continue to answer the call.

I am grateful to have you on this journey with us.

Warmest regards,

$38,866,796

WellMed Charitable Foundation 13-year impact

2019 BY THE NUMBERS

<table>
<thead>
<tr>
<th>Senior Centers</th>
<th>Social Responsibility</th>
<th>Caregiver Programs</th>
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<tbody>
<tr>
<td>44,535 older adults served in 2019</td>
<td>$1,196,733 in contributions</td>
<td>7,678 caregivers served</td>
</tr>
<tr>
<td>11 senior centers</td>
<td>40,880 hours volunteered</td>
<td>80 Caregiver Teleconnection Sessions</td>
</tr>
<tr>
<td>43,379 total members</td>
<td>$1,009,327 value to the community</td>
<td>16 states offering Stress-busting for caregivers</td>
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Among the WellMed Charitable Foundation’s most important missions is funding and operating its 11 senior centers throughout Texas and Florida. The centers provide no-cost services and activities to adults 60 and older, and many are located next door to WellMed or Optum clinics for easy access to health care. Our newest senior center, which opened Jan. 24, is at Red Road in Miami, Florida, adjacent to two senior apartment complexes. Offering a host of activities such as monthly birthday celebrations, cooking classes, Aging Mastery programs and chair volleyball, the WellMed Charitable Foundation’s senior activity centers help improve the health and well-being of its more than 43,000 members.

Kim Pawlik, 60

Dallas Senior Center:

“I had both knees replaced and since I’ve been coming to this center I’m walking better and feeling better. The center has so much to offer – a place to talk, play games and meet and greet. Experienced people to help you get better, plus they feed you! There is no place I would rather be.”

Arthur Bolden, 73

Doris Griffin Senior Center:

“This senior center is a God send. I was single and retired and decided to visit the senior center five years ago just to see what it was about. I started out just using the treadmill, but within two weeks I was doing Zumba, joined the flash mob, started playing ping-pong, and joined the Theatre Group, where I recently filmed a teaching video in Spanish for the Stress Busters program. And, I’m not single anymore after meeting Rosa!”

Jorge “JJ” Villarreal

Among the many fitness classes offered at our senior centers is belly dancing.

Dorothy L. Lopez Senior Activity Center

Veteran’s Day at the Cisneros, Griffin and Lopez Centers: Veterans Day celebrations at Cisneros, Griffin and Lopez Senior Centers honored members who served their country.

Doris Griffin Players:

Jorge “JJ” Villarreal and Rosa Ramos perform in Check Please, a production of the Doris Griffin Players theater group at the Doris Griffin Senior One Stop Center in San Antonio.

Dorothy L. Lopez Senior Activity Center

Above: Members in the Miami center that reopened into a larger space share goodies with trick or treaters.

Dorothy L. Lopez Senior Activity Center

Griffin Belly Dancing: Among the many fitness classes offered at our senior centers is belly dancing.
Serving 43,000 members at 11 locations

San Antonio
Austin
Corpus Christi
McAllen
Harlingen
Dallas
Miami

Our members often serve others through volunteering, an activity that supports the community while giving them a sense of purpose. Sorting donations of food, participating in charitable events and organizing fundraisers, are just a few ways our members keep busy.

25,995 hours of service

DORIS GRIFFIN PLAYERS: Jorge “JJ” Villarreal and Rosa Ramos perform in Check Please, a production of the Doris Griffin Players theater group at the Doris Griffin Senior One Stop Center in San Antonio.

DFW ART PROGRAM: Martha Day, above, creates a piece of art with dotting, a technique originating in Australia’s Aborigine culture, at the WellMed Charitable Foundation Senior Activity Center in the Oak Cliff area of Dallas. One of many art programs offered at the foundation’s senior centers, classes are taught by professional artist in everything from Pop Art to portraits, and is suitable for artists of all capabilities, beginner to advanced.

VETERAN’S DAY AT THE CISNEROS, GRIFFIN AND LOPEZ CENTERS: Veterans Day celebrations at Cisneros, Griffin and Lopez Senior Centers honored members who served their country.

 VOLUNTEERING: Joyce Walker, who volunteers at the Lopez Senior Center regularly, helps new members fill out their paperwork after showing them around the facility.

MEAL SIGNUP: Senior center volunteers help members sign up for the new meal program at the WellMed Charitable Foundation Senior Activity Center in Dallas.
Serving more than 7,600 caregivers in 2019, the Caregiver SOS team continues to reach out through support groups, in-person visits and events to assist caregivers on their journey throughout Texas and Florida and beyond. The WellMed Charitable Foundation has three signature programs provided at no charge to caregivers: Caregiver SOS, Stress-Busting Program™ and Caregiver Teleconnection.

“ I value the caregiver program because I have learned it’s important to care for myself.”

JUANITA DELEON, 65

“The stress busting program came at a critical time when I was burnt out and almost without hope.”

RICK TOBIN, 68

“I feel like I have a new family with the friends I’ve made at the Caregiver SOS.”

GRACIE HERNANDEZ, 65

Thank you to our caregiver partners!

The goal of the Caregiver SOS program is to promote self-care along the caregiver journey. Here, program attendees in McAllen take time to de-stress through exercise.

The “Caregiver SOS on Air” radio show continues to bring experts in the field to a universally accessible podcast aimed at reaching caregivers wherever they might be. Nationally recognized caregiving professionals, authors and leaders stop by to share their insight into the caregiver journey.
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Caregiver Support Specialist and Facilitator Romy Zarate, above with cake, joins graduates of the nine-week Stress-Busting Program for Family Caregivers, a multi-component program that provides education, support and stress management skills to caregivers.

Last year we welcomed 23 new organizations and 41 individuals to the stress-busting family, increasing our coverage to 16 states in the U.S.

<table>
<thead>
<tr>
<th>State</th>
<th>New York</th>
<th>Oklahoma</th>
<th>Texas</th>
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<tr>
<td>Alabama</td>
<td>Illinois</td>
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<td>Colorado*</td>
<td>New Mexico</td>
<td>Texas</td>
<td>Utah</td>
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*Statewide implementation

Stress-Busting Program for Family Caregivers™

This 9-week course introduces stress management techniques to caregivers to prevent burnout. In 2019 the program added an online adaptation to improve accessibility. Utilizing a train-the-trainer model, the program is currently offered in 16 states through local partnerships.

CONNECT WITH US! You can find Caregiver Teleconnection Session recordings at www.caregiversos.org

Grace and Brandy met through a Stress-Busting class in 2017 and continue to keep in touch. After they both lost their moms, they decided to take a road trip together to Pensacola, Florida, as part of their journey of healing.

“Caregiver SOS helped me understand what was going on with my mom. It showed me how to make time for myself and understand that it’s the disease, not her.”

RAUL ZUNIGA, 61

“Caregiver SOS stimulated my father’s mind and gave him an opportunity to socialize with other seniors. Meanwhile, I could learn to relax during the long days and nights of caregiving.”

GWENDOLYN BAILEY, 71

2019 Teleconnection Results

- 80 sessions offered
- 2,109 participants
- 1,965 listens on SoundCloud
The WellMed Charitable Foundation regularly contributes to charities that help us fulfill our mission to improve the lives of older persons and their caregivers.

$1,196,733

Donated to charities across Texas and Florida focusing on:

Health & Fitness
Aging In Place
Caregiver Support

Food Insecurity
Economic Security
Social Isolation
El Paso Strong

The city of El Paso experienced a great tragedy on Aug. 3, 2019, when a gunman carried out a horrific mass shooting. With such a big presence in the El Paso community, WellMed employees immediately stepped up and started helping those affected by the tragedy. The WellMed Charitable Foundation set up the El Paso Strong Fund and employees from every market across Texas and Florida contributed – raising $74,561. Inspired by the response, our WellMed and WellMed Charitable Foundation founder, Dr. George Rapier, along with his wife Kym, added a generous contribution of $500,000.

The George & Kym Rapier Family Foundation announce a $500,000 contribution to the El Paso Strong Fund.

WellMed employees GIVE to support older adults

Each year, WellMed employees contribute to the GIVE campaign – our biggest effort to raise funds for older adults. Every donation is matched and given to charities in our local markets. In 2019, more than $1 million was raised for our WellMed communities.

The WellMed Charitable Foundation renewed a partnership with the City of Dallas Park & Recreation Department to provide seniors free access to health and fitness programs. Since beginning the partnership more than 3,000 older adults have enrolled in the program.

ABOVE: WellMed of Tampa celebrates $74,000 raised for area charities.

LEFT: WellMed of Rio Grande Valley in Texas announces a $1.2 million investment in the market.

In solidarity with the El Paso community, Jimmie Keenan (Sr Vice President of Enterprise Clinic Operations) and Carol Zernial (WCF Executive Director) present El Paso Strong shirts to WellMed employees in the market.

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Compassion for our communities

Employees at WellMed regularly spend their free time volunteering in the community. When older adults or caregivers are in need, you can count on them to step in and help. It’s no wonder compassion is one of five top values at the company. Members of the volunteer council organize events for WellMed employees and their families across 12 communities in Texas and Florida. They organize opportunities to collect needed items, volunteer time and donate funds to local charities. Members of our senior centers are also generous with their time, volunteering to help with operational tasks at the centers and out in the community.

Food insecurity is a major issue affecting seniors across the nation. WellMed employee volunteers help meet the need of seniors who lack enough food by delivering groceries to medicare-eligible seniors at WellMed clinics. The effort is a partnership between the WellMed Charitable Foundation and the San Antonio Food Bank.

When a local organization reached out to WellMed of the Treasure Coast for help, employees jumped at the chance to meet the need and delivered 3,500 adult diapers to the Kane Center in Stuart, Florida.

WellMed employees regularly support the Alzheimer’s Association Walks. Here, WellMed of Jacksonville shows their support. All employee donations are tripled for the cause – a total of $16,000 was raised in 2019.

Summer can be a challenging time for older adults. WellMed hosted an enterprise-wide fan drive to keep our seniors cool. Seniors in Miami celebrate their donation from WellMed of Miami.
40,880 hours of service
$1,009,327 value to the community

The holidays are a special time for giving back. Every year, employees in Corpus Christi deliver blankets and warm clothing to seniors in need.

WellMed of Orlando raised $2,300 in support for the local ALS Foundation walk.

The WellMed Charitable Foundation is proud to support the Texas Ramp Project. Employees built 15 ramps in 2019 to keep seniors at home and restore their independence.

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Members of the Doris Griffin Senior Center in San Antonio took home the first place win on the Canyons course. Their participation was courtesy of sponsors Brian and Ilene Novy.

It was a historic year for the 10th annual WellMed Charitable Foundation Golf Classic. Participation grew so much we needed two courses to accommodate the players — 45 foursomes showed up for a great day of golf on the cool October morning.

The tournament set a record, raising $58,000 for the WellMed Charitable Foundation. We also presented an award of recognition to our long-time Presenting Sponsor, Baptist Health System.

The top three teams from each course enjoyed fabulous prizes and even the last place teams were awarded gift cards to practice their swing. Surprises throughout the day.

Thank you to our top sponsor

**BAPTIST HEALTH SYSTEM**

A COMMUNITY BUILT ON CARE

**SPONSOR SPOTLIGHT**

VITAS Healthcare is a valued partner to WellMed and a steadfast supporter of the WellMed Charitable Foundation. Together, we provide the best care we can to older adults in palliative and hospice care. Thank you, VITAS, for your support of older adults!
Our eager group of participants take off from the starting line.

Rain threatened to cancel the 9th annual Run for Seniors, but it failed to stop more than 800 registrants from keeping their commitment to health. Seniors from 16 different senior centers joined us for this event promoting health and wellness for older adults. Ours is a unique race in that our seniors enjoy race awards for walkers as well as runners.

WellMed Senior Vice President Jimmie Keenan greets 93-year-old WWII vet Alfredo at the finish line.

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Alberto and Emma Ibarra cross the finish line together. After accepting their first-place medals in the 70+ category, they hit the dance floor to celebrate.

WellMed Senior Vice President Jimmie Keenan greets 93-year-old WWII vet Alfredo at the finish line.

SPONSOR SPOTLIGHT

United Healthcare is on a mission to help people live healthier lives and make the health system work better for everyone. We are thankful to such a visionary partner for their generous support of the Run for Seniors, Golf Classic and Caregiver Summit in 2019.
The WellMed Charitable Foundation is actively engaged in research and evaluation grant partnerships that inform the best care for older adults.

**CODE: SALSA**

In May 2019, the WCF implemented the Community of Dementia Excellence: Successfully Aging and Living in San Antonio (CODE: SALSA). This three-year project is funded through the Administration for Community Living, a federal agency under the Department of Health and Human Services.

One goal of the project is to positively impact the lives of persons living with or at risk for Alzheimer’s disease in the San Antonio area by creating a mini dementia village program at Morgan’s Wonderland, the world’s first totally accessible theme park. This program provides recreational and socialization opportunities for this group as well as activities for family caregivers to give them more information about the disease process through our partnership with the Alzheimer's Association. Attendance at the first year’s dementia village activities well exceeded expectations, demonstrating the need for these programs.

Our social work team works with individuals living alone with dementia, helping to connect them with community resources that provide a safe home for as long as possible. Caregivers receive programming support through the Caring for the Caregiver program at the UT Health School of Nursing.

**Building Economic Security**

The Economic Security Program, funded in part through the San Antonio Area Foundation, provides a valuable resource to members of WellMed Charitable Foundation senior centers in San Antonio. Our economic security caseworker provides economic assessments with a goal to increase income and decrease expenses. These efforts enable older adults to become more economically secure, decreasing chronic stress and improving quality of life.

1. 187 economic assessments completed
2. $6,500 overall increase in income for members
3. $30,000 in decreased expenses

**Preventing Elder Abuse**

The WellMed Charitable Foundation completed a multi-year research partnership with Adult Protective Services of Texas to identify older adults at risk for elder abuse in WellMed clinics. Patients receive a social needs assessment as part of a wellness visit with the doctor and intervention occurs where needed. We identified many patients at risk of self-neglect with 55% being food insecure and 40% needing assistance with activities of daily living. Despite the grant’s conclusion, the WellMed Charitable Foundation continues to house an APS specialist within the medical practice to expand upon our success.
Above: WellMed Charitable Foundation Executive Director Carol Zernial gives an interview to local news station WOAI during a backpack donation at the Mays Family Clubhouse in San Antonio.
Right: WellMed employees stuffed 500 backpacks that were donated to The Boys & Girls Clubs of San Antonio to benefit grandparents raising their grandchildren, along with $10,000.

The U.S. Department of Health and Human Services (DHHS) named Carol Zernial (center), executive director of the WellMed Charitable Foundation, to the RAISE Family Caregiving Advisory Council. The group will advise Assistant Secretary for Aging, Lance Robertson.

The WellMed Charitable Foundation presents a $575,000 donation to the Paso Del Norte Community Foundation in support of the One El Paso Fund.

The WellMed Charitable Foundation was recognized as Business of the Year by the City of Dallas Park and Recreation Department. In 2019 the Foundation opened a senior center in the Oak Cliff neighborhood in partnership with the city.