

SUPPORTING SENIORS AND CAREGIVERS IN THE COMMUNITY



2022 ANNUAL REPORT



WELLMED
CHARITABLE FOUNDATION

www.wellmedcharitablefoundation.org



Friends and Supporters:

Last year was a recovery year for us as the world continues to rebuild after a global pandemic. Luckily, with the COVID vaccine and booster shots widely available, much of our 'regular' activities looked more available to us on the horizon. So we got to

work. Our Caregiver Program expanded through a partnership with the City of San Antonio. We welcomed two new staff members who quickly got to work building support groups and Stress-Busting sessions for eager caregivers. We are now operating our Stress-Busting program in 21 states across the U.S.

Like many, we were shocked to witness the horrific shooting that struck our neighboring town of Uvalde, TX. The WCF rallied our resources to provide \$450,000 in support to a devastated community. Our contributions were made to local organizations on the ground who were already engaged in community response. We were humbled to invest in their imperative work to heal.

Later in the year, mother nature hit with her own tragedy. Hurricane Ian devastated areas of Florida, especially Fort Myers, with a significant impact affecting older adults in the region. Once again, we saw the opportunity to assist and made a \$400,000 investment in the Hope Heroes program that will directly connect older adults recovering from the storm with in-person resources to help them rebuild.

Our work is never done and we consider it a privilege to advocate for vulnerable older adults in New Mexico, Texas and Florida. Through our senior centers, caregiver programs and contributions, our overall impact is at \$70 million since we started the foundation in 2006.

This incredible work doesn't happen without a dedicated team, passionate board and caring volunteers. Please accept my heartfelt gratitude for all of your partnership today and always.

Sincerely,

George M. Rapier III, M.D.
Chairman, WellMed Charitable Foundation



Friends of the Foundation:

Every year brings challenges and opportunities in our WellMed communities, and 2022 was another where we worked to fill needs and enjoyed some successes. We were still facing challenges related to another year of the COVID pandemic, but we were able to reopen our senior activity centers

reconvene our caregiver support groups, and enjoy seeing each other in person.

One of the highlights of 2022 was the grand opening of the Roy Florez Senior Activity Center in Miami. Roy Florez was a friend to WellMed and to the Foundation, and we were honored to host his family and local dignitaries at the new center named to celebrate his legacy.

We saw again that it is during the most difficult times that our board, our staff, volunteers and donors embody our mission of service. The tragic shooting in Uvalde, Texas and the devastation of Hurricane Ian in Florida were opportunities to support local non-profits and our own WellMed team members who were negatively impacted by these events. Recovery will take time and we will continue to take into account their needs for healing and rebuilding.

We are most proud of the 203,000 older persons and caregivers whose lives we impacted in 2022 with \$1.8 million in support to nonprofits in Texas, Florida and New Mexico. We thank the volunteers who provided almost 13,000 hours of service. We are especially grateful to our board and the WellMed employees who have given generously from their paychecks to make our work possible.

I hope you will enjoy seeing the faces of the people we serve, the organizations we support, and the accomplishments of the WellMed Charitable Foundation in 2022.

Best Wishes,

Carol Zernial
Executive Director, WellMed Charitable Foundation

By The Numbers



203,851

Older adults served



\$1.8 million

Total Contributions
to Charity



10,447

Caregivers Served

12

Senior Centers

12,850

Hours Volunteered

118

Caregiver Teleconnection
Sessions

53,012

Total Members
since opening

\$384,857

Value to the community

19

States (& Puerto Rico)
offering Stress-Busting
Program

\$70.4 million

16-Year Impact

SENIOR CENTERS

We are proud that the WellMed Charitable Foundation continues to be a trusted partner in our community, a pillar of stability and trust that provides resources to older adults 60 and older at 12 senior activity centers. There are eight activity centers in Texas and four in Miami, FL. The centers provide members with opportunities to socialize, have fun, learn new hobbies, and build relationships. On site, there are stimulating activities like exercise classes, dance, cooking, arts & crafts, brain health and more. For those that cannot attend in person, virtual classes are offered on the WCF website. For the past 12 years, 53,000 seniors have enjoyed attending and improving their overall health. Many of the centers are located adjacent to WellMed or Optum clinics, which provide access to health care and health education.



DALLAS, TX: The members at the Dallas Redbird Center created a self-taught sewing/quilting class. Members help one another learn and create amazing projects.



MIAMI, FL: Older adults get their groove on at the grand opening of the Roy Florez senior center. Over 400 people that were in attendance enjoyed dancing, food, and music, a tour of the new center.



LOPEZ San Antonio, TX

"I enjoy coming to Alicia Trevino Lopez Senior center because it keeps me active. I love the fitness classes. This is my second home."

JUDY BROCK

ROY FLOREZ Miami, FL

"I am so grateful for the opening of the new center. I get up in the morning now knowing I have a place to go and spend the day with new friends. We have a great time and enjoy all the activities."

ELENA SANCHEZ

AUSTIN Austin, TX

"I value the center because I have met staff and members who are compassionate and willing to listen. They are open and receptive to suggestions. I have more friends now and I'm getting stronger through exercise. Best of all – everything is free, it doesn't cost me a single dime to stay healthy."

ANNETTE CENTORBI



SAN ANTONIO, TX: The Cisneros Center celebrates Veterans Day with appearances by Harlandale ROTC and Councilwoman Rebecca Viagran.

Serving
9,000+
active
members
at 12 senior
centers

San Antonio
Austin
Corpus Christi
McAllen
Harlingen
Dallas
Miami



CORPUS CHRISTI, TX: Members enjoy a healthy breakfast included in their breakfast bag distributed by the staff.



AUSTIN, TX: The WCF Austin Senior Activity Center offers art classes for members to craft on canvas and display in their homes.



Like us on Facebook:
facebook.com/wellmedgives



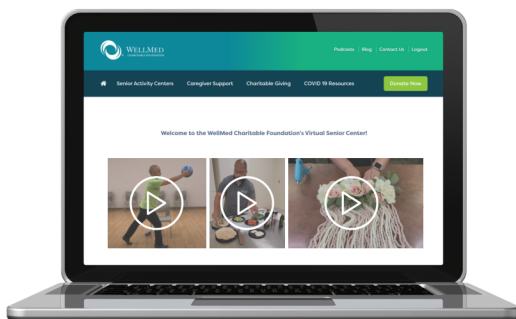
Follow us on Instagram:
[@WellMedGives](https://www.instagram.com/WellMedGives)



305,424

MEALS DELIVERED IN 2022

With dining rooms re-opening, staff welcomed back members with warm meals to enjoy with friends at the senior centers.



**JOIN THE VIRTUAL
SENIOR CENTER!**

Enjoy weekly fitness, cooking and craft videos from the comfort of your home at no cost!

Scan me with
a smartphone!



WWW.WELLMEDCHARITABLEFOUNDATION.COM/VIRTUAL-CENTER

CAREGIVING

The Caregiver SOS program served more than 10,000 caregivers in 2022 by providing information and support to family and professional caregivers throughout Texas and Florida and beyond. Caregivers were able to get the help they needed through support groups, educational classes, connecting to area resources and individual coaching. A special highlight this year were the two Caregiver Summits held in November in honor of National Family Caregiver month. One session was in English and one in Spanish. Both were hybrid events that brought out many caregivers who learned about the importance of taking care of themselves.

CAREGIVER SOS



Caregiver Specialists provide information and support to family caregivers caring for an older loved one. Personalized guidance with managing daily activities and making decisions to improve care is offered on a 1:1 basis or in a group setting. These services are offered in San Antonio, Corpus Christi, the Rio Grande Valley, Dallas and El Paso. Support groups and stress-management classes are also provided along with an annual Caregiver Summit that features experts in the field of caregiving.

2022 CAREGIVER SOS IMPACT

10,447 Caregivers Served

118 Teleconnection Sessions

19 States (and Puerto Rico) offering Stress-Busting



CAREGIVER SOS ON AIR

The "Caregiver SOS on Air" radio show and podcast continues to bring experts in the field to caregivers wherever they are. Nationally recognized caregiving professionals, authors and subject-matter experts stop by to share their insight into the caregiver journey.

Listen
anywhere
you find
podcasts!

"I welcomed the opportunity to be part of the 9 week Stress Busting program. My participation in the group heightened my awareness of how pervasive and insidious stress can be when it is chronic. Now, five years in, I'm aware that I must upgrade my coping skills, and am taking compassionate action to do so."

JUDI

"Although I had experienced short term caregiving in the past, I was unaware of the long-term stressors that I needed to address for my personal health."

SUSAN BLACKWOOD

"Our journey with a devastating diagnosis of early-onset dementia ended recently. The Caregiver SOS program and Dr. Praderio with Face To Face helped us navigate our way to enlightening more bearable steps. Quite honestly, my sanity was saved through their help."

DORA GONZALES



Caregiver Support: The program supports caregivers through one-on-one coaching, stress busting classes, support groups and dealing with dementia workshops. That way, caregivers can embrace the challenges with gratitude, patience and endurance.

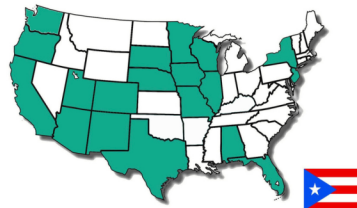


Caregiver Support Groups: Caregiver SOS in McAllen, TX added an extra support group for Family Caregivers needing bereavement support. It was a 4-month group, just enough time to help caregivers transition to the "New Normal". For the final meeting we had a picnic and they each shared a letter of gratitude for the life of their loved one.



This 9-week course introduces stress-management techniques and coping skills to prevent burnout among caregivers. Utilizing a train-the-trainer model, the program expanded to Wisconsin in 2022, now serving a total of 19 states and Puerto Rico. The Stress-Busting Program continued its virtual programming, which allowed caregivers to attend the sessions who may not have been able to do so in person.

Alabama	New Jersey*
Arizona	New Mexico
California	New York
Colorado*	Oregon
Florida	South Dakota*
Iowa	Texas
Illinois	Utah
Minnesota	Washington
Missouri	Wisconsin
Nebraska	Puerto Rico



*Statewide Implementation



Stress-Busting Program: WellMed nurses served as Stress-Busting Group facilitators at the NorthEast Senior Center in San Antonio, TX.



The Caregiver Teleconnection allows a caregiver to hear from experts in the field using just the telephone or over Zoom. Providing easily accessible learning sessions overcomes the challenges caregivers sometimes face to leave the home or find someone to care for their loved ones.

2022 TELECONNECTION RESULTS

118 sessions offered
3,405 participants

CONNECT WITH US AT
WWW.CAREGIVERSOS.ORG

THANK YOU TO OUR CAREGIVER PARTNERS!

VITAS
Healthcare

Arden Courts
Memory Care Community

CONTRIBUTIONS

The WellMed Charitable Foundation supports charities across Texas and Florida serving older adults and caregivers. The WCF is committed to supporting local charity partners with both time and treasure to make a difference in WellMed communities.

\$1.8 million donated to local charities across Texas & Florida in 2022



Employee members of El Paso Volunteer Council organized a Hoodie & Sock Drive to help older adults stay warm during the cold winter months.



Employees in the Treasure Coast presented a contribution to Elev8Hope as a result of a PB&J Drive.



The Volunteer Council in San Antonio organized a pet food drive benefitting the AniMeals program at Meals on Wheels of San Antonio. The contribution will provide food for the pet companions of Meals on Wheels clients.



Carol Zernial presented a contribution to the City of Dallas Park & Recreation Department to improve access to senior centers in the area.

Employee contributions are maximized with a match from WellMed and UnitedHealth Group, tripling every donation.

WELLMED DELIVERS

WellMed Delivers serves older adults who have an urgent food need, and are running out of food within 48 hours. The program is 100% donation funded and volunteer run.

“Meeting someone who was going through so much was a reminder for me to be more compassionate, as we don’t know what other people go through on a daily basis.”

– Volunteer



WCF PROVIDES \$500K+ DISASTER ASSISTANCE

Hurricane Ian decimated the Fort Myers community where many WellMed employees and patients live and work. To aid in the recovery after the storm, the WCF provided direct assistance to help employees and older adults rebuild. A \$400,000 grant was awarded to Hope Heroes to support the long-term recovery efforts of older adults in the area.

WCF DONATES \$445,000 TO SUPPORT UVALDE

When tragedy struck Robb Elementary School in Uvalde, the WellMed Charitable Foundation created an emergency fund to help the community. Through employee contributions, the WCF donated \$445,000 to local charities providing critical mental health services and support to re-build.



COMMUNITY
FOUNDATION
of the
TEXAS HILL COUNTRY



VOLUNTEERISM

WellMed employees are not only generous with their monetary donations, but also with their time. Wherever WellMed is, you will see them in the community helping those in need.



The threat of breast cancer is a reality many female older adults experience. Orlando WellMed employees show their support by attending the Making Strides Against Breast Cancer Walk.



The Quality team in Dallas assembled hygiene kits for older adults served by Metrocrest Services in the North Texas market. The team also raised more than \$3,000 for the cause.



Ten percent of older adults living in their own homes do not eat enough. To fight that trend, members of the Houston Volunteer Council band together with the Houston Food Bank to feed their community.



Employees from the Tampa market dressed festively and spread good cheer at Arthritis Foundation's Jingle Bell Run to support research for better treatments and a cure.

From serving at local food banks to organizing donation drives, WellMed employees are passionate about giving back to the community.



Employees in Corpus Christi made a meal for residents at the local Ronald McDonald House.



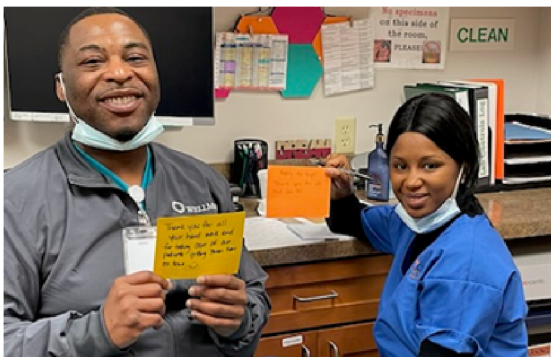
One in four seniors live alone and one in eight experience hunger. To combat this trend, a San Antonio volunteer organized food deliveries for Meals on Wheels.



Homelessness among older adults is on the rise. To support this growing population, employees of Miami area clinics assembled hygiene kits for Miami rescue mission.



Many of the children staying at Ronald McDonald House are being raised by a grandparent. To prevent the need for families to cook, volunteer council members in Fort Myers gathered to prepare a delicious spaghetti dinner.



As a token of appreciation, employees at the WellMed Austin Rosewood clinic market launched an effort to hand write cards and deliver kits to Comfort Care drivers who transport patients to their doctor appointments.



Many older adults have issues with safely accessing their own home. Rio Grande Valley WellMed employee volunteers partnered with Texas Ramp Project to build a much needed ramp.

IN THE NEWS

WCF DONATES \$400,000 TO HOPE HEROES VOLUNTEER PROGRAM

The WCF awarded a \$400,000 grant to Hope Heroes to help older adults in their recovery from Hurricane Ian. The program provides support for Florida's elders by breaking down traditional community silos to unite the private sector, faith-based institutions, non-profits and government entities to increase assistance for seniors in need, while helping to facilitate opportunities for seniors looking to serve. The Hope Hero volunteer program offers a new way for retirees to give back to their communities. Following Hurricane Ian, Hope Hero volunteers were deployed to all affected areas to volunteer at shelters, provide yard clean up, deliver meals to homebound elders and more.



WellMed Charitable Foundation Supports First Lady Casey DeSantis' Hope Hero Volunteer Program

By Florida Daily - November 21, 2022, 4:00 pm



At the end of last week, **First Lady Casey DeSantis** announced that Florida's Aging Network received a \$400,000 grant from the **WellMed Charitable Foundation** to continue support of seniors in their recovery from **Hurricane Ian** through Florida's Hope Florida - **A Pathway to Purpose Hope Hero** volunteer program.



CAROL ZERNIAL NAMED SABJ NONPROFIT AND CORPORATE PHILANTHROPY AWARD WINNER

Carol Zernial, SVP of social responsibility and WellMed Charitable Foundation executive director, for being named the San Antonio Business Journal's 2022 Nonprofit and Corporate Philanthropy Award winner.

Hired as the WellMed Charitable Foundation's first employee in 2009, Carol has worked tirelessly to create and expand programs to benefit older adults and their caregivers and provide funding to non-profits who fulfill the same mission.



< CORPORATE PHILANTHROPY & NONPROFIT AWARDS

Philanthropy & Nonprofits

2022 Nonprofit & Corporate Philanthropy winner: Carol Zernial

SAN ANTONIO
BUSINESS JOURNAL

WCF DONATES \$26,000 TO AMARILLO COMMUNITY

The WellMed Charitable Foundation presented a \$26,000 check on March 22, 2022 to the JO Wyatt Community Health Center in Amarillo. As a result, 300 care packages were provided to older adults in need. The care packages included blankets, hygiene items, and shelf stable food. Employee donations were tripled with a match from WellMed and UnitedHealth Group.

NEWS

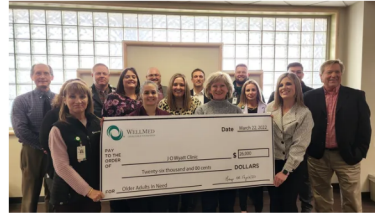
WellMed donates \$26,000 to Amarillo community health center for patient care packages

Care packages include toiletries, food, blankets

Michael Cuvellera Amarillo Globe-News

Published 3:55 p.m. CT March 23, 2022 | Updated 3:48 p.m. CT March 23, 2022

f t e



Various members of the Northwest Texas Healthcare System and WellMed Charitable Foundation worked together to raise funds for Medicare Advantage recipients in Amarillo. The donation made care packages with blankets and other items available to 300 patients. Michael Cuvellera/Amarillo Globe-News



AMARILLO GLOBE-NEWS

WELLMED OFFERING CAREGIVER RESOURCES TO PREVENT CAREGIVER BURNOUT

NEWS > HILLSBOROUGH COUNTY

f t e

WellMed offering resources to help prevent caregiver burnout



Jamie Haysman, PsyD, LCSW is the Chief Compassion Officer for WellMed Medical Management, Inc. He said caregivers of all kinds often fall into these cycles but especially around the holidays. And it's one that he says could have grave consequences.

abc ACTION NEWS WFTS TAMPA BAY

The WellMed Charitable Foundation offers free resources to caregivers who experience caregiver burn out. The WellMed Charitable Foundation has three signature programs provided at no charge to caregivers: Caregiver Coaching, Caregiver Teleconnection, and Stress-Busting Program™ for Family Caregivers.

GRAND OPENING HARLINGEN SENIOR CENTER

In April of 2022, the Harlingen Senior Center opened its doors to older adults in the Harlingen, TX Area. On hand for the festivities was Latin Grammy winner, Elida Reyna greeting attendees and signing autographs .



WellMed opens center for senior care, leisure

By Travis Whitehead April 7, 2022



INNOVATION

The WellMed Charitable Foundation is actively engaged in research and evaluation grant partnerships that inform the best care for older adults. The CODE SALSA and CAPABLE grant projects served 703 older adults and their caregivers during the year.

CODE SALSA

The WCF received approval for a fourth-year extension on the Dementia-capable grant funded by the Administration on Community Living. The grant, known as the Community of Dementia Excellence: Successfully Aging and Living in San Antonio (CODE SALSA), is a collaboration between the WellMed Charitable Foundation, San Antonio WellMed clinics, Morgan's Wonderland, and the University of Texas Health Science Center School of Nursing.

CAPABLE PROGRAM

The WCF contributed to the successful implementation of the CAPABLE program in coordination with Meals on Wheels of Central Texas and Home Care Dimensions in the Austin market. CAPABLE is a client-directed home-based intervention to increase mobility, functionality, and capacity to age in their community for older adults. Funded by the St. David's Foundation in Austin, the program served 151 older adults in 2022.

THANK YOU TO OUR GRANT PARTNERS!



GRANT SPOTLIGHT

The WellMed Charitable Foundation awarded \$745,000 to thirty-seven non-profit organizations across Texas and Florida in 2022. Funding supported projects that focused on food insecurity, caregiver respite, social isolation, home modification and dementia.



Great Age Movement creates an innovative wellness program for older adults in public places. Programs include fitness parks in green spaces, wellness online video program and mobile workout programs at local museums. WCF awarded \$25,000 in support of the Great Age Fitness Park at Ripley Community Center.

HOUSTON, TX



The mission of Family Violence Prevention Services, Inc. is to break the cycle of family violence and to strengthen families by providing the necessary tools for self-sufficiency. WCF provided FVPS with a \$20,000 grant to support older adult women seeking shelter from domestic violence.

SAN ANTONIO, TX



Meals on Wheels of Tampa was awarded a \$20,000 grant to support meal distribution services to older adults in the Tampa area.

FORT MYERS, FL



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