

ANNUAL REPORT 2024



WELLMED
CHARITABLE FOUNDATION

SUPPORTING SENIORS AND CAREGIVERS IN OUR COMMUNITIES

www.wellmedcharitablefoundation.org



Friends and Supporters:

At WellMed, we are focused on changing the face of health care for seniors – and soon the nation. We are lucky to have a philanthropic partner like the WellMed Charitable Foundation to complement that mission with an array of exceptional services

and community investments that move the needle of progress toward better health for older adults everywhere.

Over the past nineteen years, the foundation has made a \$91 million impact on our communities. This investment encompasses direct services provided to older adults at 14 senior centers; education and support for caregivers nationwide, as well as contributions made where we work and live to fund projects that improve quality of life and meet the needs of our growing population of older adults.

Every day 10,000 people turn 65 in our country. Yet just six percent of non-profits in the U.S. focus on assisting older adults. This is our opportunity to make a difference. It takes a committed team, strong relationships and significant resources to accomplish the tasks ahead of us. I am proud to say that we have all of that and more within the WellMed Charitable Foundation. With your help, we are up for the challenge.

Moving forward I am optimistic about our future as we continue this important work. Thank you so much for your generosity and support.

Sincerely,

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



Friends of the Foundation:

The WellMed Charitable Foundation continues to move forward, steadfast in our mission to improve the lives of older adults and caregivers in Texas, Florida and beyond. Our visionary board leadership, generous donors and incredible team paved the way for some incredible accomplishments in 2024.

We welcomed more than 5,000 new members through our senior center doors this year, bringing our grand total to 63,000 members since we started in 2006. Mid-year we announced an exciting new partnership with Wowzitude to offer live-streaming tours from around the world. Our members are experiencing the joy of travel without the price tag and long security lines. Instead, they come to their local center or join us online as we tour incredible places like Paris and Prague. Each 'trip' includes an activity kit with destination inspired movie recommendations, recipes and facts. The end of the year brought us our 14th location in Brownsville, TX.

Our caregiver programs continue to provide guidance and relief in Texas, Florida and nationwide, assisting more than 60,000 people in 2024. Caregivers meet us at different spots in their journey, whether it be at the beginning of a diagnosis or at burnout after years of care. No matter when they reach out, we are dedicated to their well-being. Our Caregiver Teleconnection program welcomes participants from 49 states. The Stress Busting Program is now operating in 21 states plus Puerto Rico. The Annual Caregiver Summit is growing in attendance. Our transition to virtual programming has opened us up to new audiences around the country.

Our efforts to support the nonprofit community also grew this year. We added a third fundraiser at TopGolf in Tampa that proved to be a successful venture for our fundraising efforts. In 2024, we awarded \$1.2 million to charitable partners in New Mexico, Texas and Florida. With just 2 cents of every dollar donated in this country supporting older adult-related causes, we are proud and privileged to contribute to the network of organizations who advocate for the older adult population.

I am so proud of the work we accomplish year after year. Thank you for your investments of time, treasure and confidence in our team. Together we are building a strong future for older adults and their caregivers.

Best Wishes,

Carol Zernial
Executive Director, WellMed Charitable Foundation

2024 By The Numbers



103,562

Older adults served



\$1.2 million

Total Contributions



60,345

Caregivers served

14

Senior Centers

18,690

Hours volunteered

73

Caregiver Teleconnection
Sessions

15,150

Senior Activity Center
members

\$625,928

Value to the community

21

States offering
Stress-Busting program

\$92 million

18-Year Impact

SENIOR ACTIVITY CENTERS

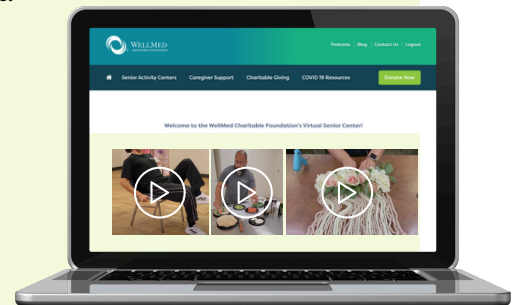
We are proud that the WellMed Charitable Foundation continues to be a trusted partner in our community, a recognized pillar of stability that provides resources to older adults 60 and older at 14 senior activity centers: nine in Texas and five in Florida. The centers provide members with opportunities to socialize, have fun, learn new hobbies, and build relationships. Each center offers stimulating activities like fitness 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 16 years, 60,000 seniors have enjoyed participating in our centers to make new friends and improve their overall health.



HARLINGEN, TX: Members celebrate Senior Citizen Day at the Harlingen Senior Activity Center. Each member wore their teal "Senior-iffic!" shirt, obtained by new members after they joined the center.

JOIN THE VIRTUAL SENIOR CENTER!

New fitness, cooking and craft videos uploaded weekly, plus live stream tours around the world. All accessible from the comfort of your home at no cost!



SCAN ME

WELLMEDCHARITABLEFOUNDATION.COM
/VIRTUAL-CENTER



Serving
15,000
active
members at
14 senior
centers

- San Antonio
- Austin
- Corpus Christi
- McAllen
- Harlingen
- Dallas
- Miami
- Orlando
- Tampa

“ **SUN CITY**
TAMPA, FL

The dance classes are so wonderful, and I feel so much better when I come.

I also enjoy the health workshops, and I love the staff!

DOROTHY, 74 ”

“

AUSTIN

AUSTIN, TX

My arthritis is much better.
Family and friends have
commented on my improved
mobility.

DIANE

”



MIAMI, FL: Little Havana & Red Road members have a picnic at the park to celebrate Older Americans Month and Mother's Day.



SAN ANTONIO, TX: Lopez Senior Center member, Lucy, rekindled her love for drawing and writing after taking her first art class. She is now an avid attendee.



SUN CITY & FERN PARK, FL: In 2024, the WCF opened two new locations in Florida for older adults to stay active and find community!

DALLAS, TX: Members of the Redbird Square Senior Center view their work on display at the Dallas Museum of Art.

IF YOU ARE

60+

SIGN UP FOR YOUR
FREE MEMBERSHIP
BY SCANNING THE
CODE WITH YOUR
SMARTPHONE



SCAN ME

“

LITTLE HAVANA

MIAMI, FL

This is the best place
to be at this time in
our lives

ESTHER V.

77

”



CAREGIVING

The Caregiver SOS program served more than 60,345 caregivers in 2024 by providing information and support to family and professional caregivers throughout our WellMed communities and across the nation. Caregivers were able to get the help they needed through support groups, educational classes, connecting to area resources and individual coaching. Two Caregiver Summits, in English and Spanish, were special highlights of the year where caregivers learned about caregiving in today's world. Both were hybrid events that brought out many caregivers to learn about the importance of taking care of themselves.



A group of caregivers gathered together at the Lindale Senior Center in Corpus Christi, Texas, for their annual Easter holiday celebration. Attendees enjoyed a range of activities including: musical chairs with a twist, an Easter egg hunt, piñata, lunch and music.

2024 Caregiver Summit: Caregivers attend the Caregiver Summit Hybrid event at the Elvira Cisneros Senior Center and learned about the challenges of in caregiving in today's world



LISTEN TO



The award-winning Caregiver SOS on Air radio show/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 caregiving journey.



 LISTEN NOW

Listen anywhere you find podcasts!

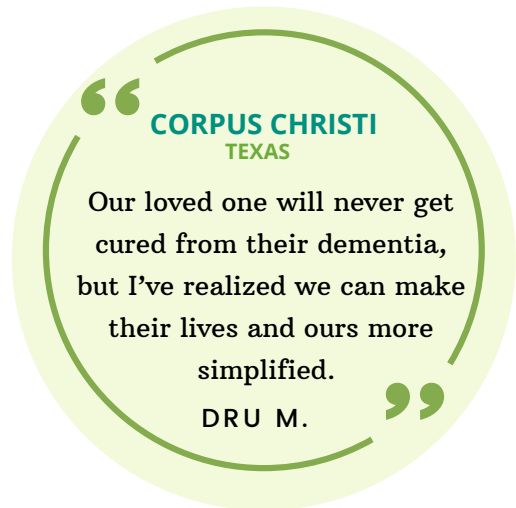
“ **SAN ANTONIO**
TEXAS

I have learned so much being in the class. I am able to not get upset as much as I used to do. It's been less stressful and I am loving it.

MARILYN ”



Caregiver Specialist, Veronica Maillard Estrada hosts a support group at a nursing home in McAllen, TX that allows some caregivers to bring the person for whom they are caring

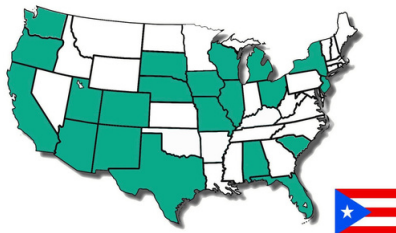


This 9-week course introduces stress-management techniques and coping skills to prevent burnout among caregivers. Utilizing evidence-based practices, the program serves 21 states and Puerto Rico. The Stress-Busting Program is offered in person and online.



Stress Busting Group: Stress Busting, Chronic Illness completed at Normoyle Senior Center District 5, attendees learned stress relaxation techniques, coping with stress, and more importantly shared how their peers helped make it a memorable experience.

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



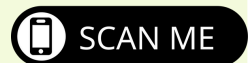
*Statewide Implementation



The Caregiver Teleconnection allows caregivers to hear from experts in the field using just the telephone or over Zoom. These easily accessible learning sessions helped over 58,000 caregivers to get the latest information and share their experiences.

WATCH TELECONNECTION RECORDINGS ON YOUTUBE

Missed a session?
Visit our YouTube channel and watch all recorded sessions.



THANK YOU TO OUR CAREGIVER PARTNERS!



CONTRIBUTIONS

The WellMed Charitable Foundation supports local charities serving older adults and caregivers across Texas and Florida with a focus on impacting social determinants of health: food insecurity, economic security, transportation, housing, and social isolation.

\$1.2 million donated to charities in New Mexico, Texas & Florida

- Meals on Wheels and More
- Faith in Action Georgetown
- Family Counseling Service
- Rebuilding Together El Paso
- El Pasoans Fighting Hunger Food Bank
- Texas Tech Foundation
- Ciudad Nueva Community Outreach
- Bread of Life
- BakerRipley
- Metrocrest Services
- Taste Project
- Amigos Del Valle
- Meals on Wheels San Antonio
- San Antonio Food Bank
- Texas Diaper Bank
- King's Compassion
- Merced Housing
- SAMMinistries
- SA Christian Hope Resources Center
- The Rainbow Center
- Texas Ramp Project
- Special Olympics Texas
- Women's Center of Tarrant County, Inc



A MENU WITH NO PRICES

Located in Fort Worth, TX, the vision of the Taste Project is to see the community design, lead and implement solutions to challenges related to food insecurity. The Taste Community Restaurant has no prices. Instead, guests are asked to pay what they can afford.

Designed to provide a multifaceted solution addressing key challenges faced by older adults and their caregivers, the restaurant promotes economic stability, alleviates food insecurity and reduces social isolation.

Grant funding provided by the WellMed Charitable Foundation covered 2,400 meals for older adults in the area.



- Meals on Wheels Tampa
- Tampa Metropolitan Area YMCA
- Senior Resource Association
- Alzheimer’s Association
- Alliance for Aging
- Council on Aging of St. Lucie
- Gulfport Senior Center
- Seniors in Service
- Bonita Senior Center
- Community Cooperative



VEGGIE VAN BRINGS LIFE TO FOOD DESERTS



The Veggie Van is making grocery trips easier and more accessible to older adults in the Tampa Bay area thanks to a grant from the WellMed Charitable Foundation. The mobile marketplace offered by the YMCA travels to communities with limited access to healthy foods and provides free and fresh produce.

According to the US Census Bureau, nearly 14% of individuals aged 65 and older live in poverty in Hillsborough County. With perishable foods high in cost, this causes older adults to seek unhealthy alternatives or skip much needed medications to stay within their budget—not to mention the added challenge of transportation to the grocery store for those with limited mobility. Additional funding from the WCF will help the YMCA accomplish their goal of adding two more centers to the bi-weekly delivery route every year for the next 6 years.



Now in its fifth year, the Compassion Fund provides individual grants to older adults, caregivers and employees facing financial hardship including natural disaster assistance. Three significant storms hit in Houston and Florida in 2024. Hurricanes Beryl, Milton and Helene left many of our colleagues stranded without power. The WellMed Charitable Foundation stepped in to provide emergency housing and recovery support.

VOLUNTEERISM

In partnership with WellMed Medical Management, the WellMed Charitable Foundation provided employees with more than 150 opportunities for volunteer service across Texas and Florida.



Corpus Christi - WellMed volunteers serve thanksgiving meals to residents at the Villa Maria Senior Citizen Community.



El Paso, TX- Volunteers test out the ramp build for a wheelchair bound older adult. Employee Community Councils organize builds with the Texas Ramp Project across the state



Austin - Volunteers assemble dignity kits for clients served by AGE of Central TX



Houston - The local employee council was recognized with a President's Volunteer Service Award for their hours with the local food bank.



The Dallas Employee Community Council volunteers with Tango Charities to assemble meals for people in need.



Rio Grande Valley - Each year, volunteers walk alongside members from the local senior center for Elder Abuse Awareness day



San Antonio - WellMed employees enjoy a Luncheon Loteria benefitting the WellMed Charitable Foundation.

Led by colleagues with a passion for giving back, volunteer events are organized by local employee community councils who offer their time to causes that are important to them.



Treasure Coast - Local WellMed team members assemble hygiene kits for the homeless population served by Love and Hope in Action.



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Ft Myers - A local team participates in the Relay for Life benefitting the American Cancer Society.



Jacksonville - WellMed employees serve food to clients from Aging True.



Orlando - Local employees and their families participate in the Out of the Darkness Walk in support of the American Foundation for Suicide Prevention.



Miami - A local team of volunteers participate in the Alzheimer's Walk.

SWINGING FOR SUCCESS

The WellMed Charitable Foundation hosted three golf events in 2024 – all opportunities to support our mission to impact older adults and caregivers. WellMed providers and WellMed business partners from Texas and Florida raised more than \$300,000 for the cause.

TOPGOLF DALLAS

Our second year in North Texas doubled in event participation with more than 200 attendees. Sponsors included South Region executive leadership and clinicians, vendor partners from IT and facilities, health plan partners and more. A crew of smiling volunteers executed the event with flying colors and the team surpassed their fundraising goal, raising \$58,000 for the WellMed Charitable Foundation.

Congratulations to first place winners of the tournament - IKS Health. Other team winners included ACIS, Dr. George Williams/Chip Zahn, and Dr. Stephanie Copeland/Janet Newman/Julie Linn and Recca Terral.

A very special thanks goes out to our dinner sponsors: Bryan Grundhoefer, Dr. Carlos Hernandez, Jimmie Keenan and Joe Zimmerman.



First place winners, IKS Health, accept their awards



Members of the RedBird Senior Center enjoyed competing in the tournament thanks to sponsors John Lovelady, Dr. Barbara Allen and her husband Lt. Col (Ret) Don Allen, Copeland Insurance Group and Kelly Restoration.

THANK YOU TO OUR TOP SPONSORS!



TOPGOLF TAMPA

Our newest TopGolf event in Tampa quickly outgrew the 10 bays reserved, ending up with 26 teams and nearly 200 guests. The abundance of support led the team past the original fundraising goal bringing in a final amount of more than \$75,000.

Congratulations to our first-place winner of the tournament - Wilson & Company Construction. Other team winners included NAI Southcoast, Clinical Engineering Partners and SmartScrubs.

A very special thanks goes out to Carenet Health, Vanguard Cleaning Systems of South Florida and Golden Outlook for sponsoring teams from the Sun City Senior Center. Our members loved participating in the event.



Wilson and Company Construction celebrate their first place win.



Members of the WellMed Supportive Care Team enjoy a team night out compliments of Dr. Elizabeth Glazier, Chief of Supportive Care



Members of the Doris Griffin Senior Center collect their third first place trophy in three years at the 2024 Golf Classic.

SAN ANTONIO GOLF CLASSIC

Our signature event in San Antonio welcomed 180 golfers on an October morning to the Hyatt Hill Country Golf Club in San Antonio. The event raised over \$173,000 for our mission to improve the lives of older adults and caregivers.

Congratulations to the Doris Griffin Senior Center team, sponsored by Rick Everett, Senior Vice-President of Network Programs, for winning first place

THANK YOU TO OUR VOLUNTEERS!



IN THE NEWS

ANGEL INVESTOR DONATES \$111,000 TO SUPPORT THE AUSTIN SENIOR ACTIVITY CENTER AND LINE DANCING

Cecilia Yeo joined the senior center in 2014 and attended regularly both in-person and online. With her closest relatives living in California, it seemed Cecilia adopted the Austin Senior Activity Center by the WellMed Charitable Foundation as her family of choice 1,700 miles away. Melissa Kavanagh, the fitness advisor at the center, remembers Cecilia as quiet and kind. Her friends at the center remember she loved to dance and often helped when other members were struggling. All were shocked and saddened by the news of her sudden passing last fall.

Then, Cecilia surprised everyone when the center received a call from her attorney that named the Foundation with a \$111,000 bequest. Cecilia left no instructions for her gift other than a humble request that her senior center family celebrate life with her favorite class, line dancing.



Seniors line dance in honor of late member

WellMed Charitable Foundation, a charity that supports senior citizens in Austin, received a big donation, and the late member who gave the money had one request: line dancing.



FALLS FREE® INITIATIVE

Texas Takes on Falls Coalition

The WellMed Charitable Foundation co-leads the Texas Falls Coalition, along with Texas Healthy at Home, to focus on falls prevention in the older adult community. This strategic planning committee focuses on education, advocacy and modern media materials to promote fall prevention awareness.

WCF Senior Centers developed and hosted fall prevention activities for older adults across Texas and Florida in September.



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facebook.com/wellmedgives



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

COMMUNITY SUPPORT

The WellMed Charitable Foundation is actively engaged in public/private partnerships with local governments or community organizations that address issues of concern for older adults.

DEMENTIA SUPPORT PROGRAM

In 2019, the WellMed Charitable Foundation introduced the Dementia Support Program to the greater San Antonio area. The program’s goal is to assist members of the community who are living with memory loss with little or no other support. Through in-home assessments and connection to community resources, participants are able to live safely and independently in their homes for as long as possible. A team of a licensed clinical social worker and community health workers assess home safety, quality of life, and needed resources.



The Community Health Workers then work with participants to establish resources in the home and create a safer living environment.

If you would like to submit a referral to the Dementia Support Program, please reach out to Alicia Nielson, LCSW at anielson@wellmed.net.

THANK YOU TO OUR FUNDING PARTNERS!





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