



ANNUAL REPORT FISCAL YEAR 2022-23

November 2023

TABLE OF CONTENTS

Page

I.	Executive Summary	1
II.	Statement of Financial Position	4
III.	FY2022-23 Grant Summary	6
	III(A): Community Grants	6
	III(B): Special Purpose Grants	8
IV.	FY2023-24 Grant Summary	9
	IV(A): Community Grants Summary	9
	IV(B): Targeted Health Impact Grants Summary	14
V.	Grantmaking Trends 2015-2024	18
	V(A): Community Grants 2015-2024	18
	V(B): Targeted Health Impact and High Impact Health Initiatives	18
VI.	Investment Portfolio Highlights	19
	Table VI(A): Amounts Received from Sale of Hospitals	19
	Table VI(B): Investment Portfolio Highlights 2015 – 2023	19
VII.	Looking Ahead: High Impact Health Initiatives	20
VIII.	Conclusion	21



I – EXECUTIVE SUMMARY

I am pleased to present the Great Smokies Health Foundation Annual Report for the period October 1, 2022 – September 30, 2023.

During the period covered in this report, the Foundation “leaned in” to its mission statement¹ in multiple, unprecedented ways.

With input from almost 200 community stakeholders obtained from 13 listening sessions that included grantees, consumers, and community partners, the Foundation’s Board of Directors established [key grantmaking priorities](#) at its strategic planning retreat in May 2023. These priorities are centered on the U.S. Department of Health & Human Services [Office of Disease Prevention & Health Promotion’s](#) Social Determinants of Health “[Healthy People 2030](#)” core objectives:

- Increasing access to and quality of primary health care;
- Increasing access to and quality of oral health care;
- Increasing access to and quality of child and adolescent mental health care;
- Decreasing the proportion of households experiencing food insecurity; and
- Reduce the proportion of people living in poverty.

GRANTMAKING SUMMARY

The Foundation’s fresh strategic focus enabled creation of two new initiatives (Targeted Health Impact Grants and High Impact Health Initiatives). Both are intended to produce measurable outcomes and impact on some of the most critical health concerns endemic to the region we serve.

The Board of Directors also approved some key internal changes last May. The grant application and reporting processes for the Foundation’s long-standing flagship Community Grants program shifted to a 2-year funding cycle. This will ease the administrative burdens of many of Great Smokies Health Foundation grantees that struggle with staff capacity.

¹ The Mission of the Great Smokies Health Foundation is to improve the health status of the residents of Jackson, Swain, Macon, and Graham counties through investment and collaboration focused on health, wellness, and prevention.

The Great Smokies Health Foundation has previously permitted its Community Grant funds to be used for a variety of routine but vital operating costs. Eligible uses of Foundation funds now include additional items not typically supported by other charitable sources, including indirect and administrative expenses, match funding for federal, state, or other private grants, and costs for accounting and external audits.

The **impact of the Foundation’s FY2022-23 grantmaking** is further detailed herein, but the **\$179,424 awarded during the last fiscal year (\$135,119 in Community Grants and \$44,305 in other “Special Purpose” grants), which touched more than 17,000 lives – a little more than \$10 per person.** While that number may not represent an unduplicated enumeration, it is nonetheless a powerful statement about the depth of need across the Foundation’s footprint. It also demonstrates that Great Smokies Health Foundation grants, leveraged with countless other funding sources, have significant and meaningful reach.

For FY2023-24 the Foundation awarded a total of \$539,235 across our 3 funding initiatives for FY2023-24, including our first-ever 2-year grants:

FY2023-24 Community Grants

- **Total awarded: \$225,400** (most were 2-year grants; \$131,928 for FY2023-24)
- Total # of organizations awarded: 21
- Total # of funded initiatives: 23

FY2023-24 Targeted Health Impact Grants:

- **Total awarded: \$195,000** (all but 1 were 2-year awards; \$105,000 for FY2023-24)
- Total # of organizations awarded: 7
- Total # of funded initiatives: 6

FY2023-24 High Impact Health Initiatives:

- **Total awarded: \$118,835** (single-year, one-time award)
- Total # of organizations awarded: 1
- Total # of funded initiatives: 1

FY2022-23 YEAR-END FINANCIALS

Even with some significant non-recurring budget anomalies (strategic plan external consultant, advertising, and unanticipated IT costs), **the Foundation exceeded its projected FY2022-23 budget by only \$2,016.**

The Syla Thrift Shop fell short of its **\$135,000 budgeted revenue target**, largely due to a closure over the holidays that extended two weeks longer than planned. **However, operating costs were almost \$13,000 less than budgeted, with net proceeds of \$67,169.46.**

I cannot overstate the importance of the Thrift Shop’s volunteers to the Foundation’s work. Under Elaine Carter’s management, there are 23 active current volunteers who regularly staff almost every component of the shop’s operations. The addition of Thursday opening hours (3:00 pm – 7:00 pm, enabling those who work during the Shop’s normal opening hours to shop with us) has been well-received by the community. Average sales since this effort began in August are approximately \$470 weekly. Hopefully, this will enhance gross revenue for FY2023-24.

INVESTMENT PORTFOLIO

Even after a \$500,000 withdrawal from our investment trust account to cover FY2022-23 grantmaking and operations going in to FY2023-24, **the ending balance of our portfolio on September 30, 2023 was \$9,231,072.15, almost \$840,000 more than our total initial corpus of \$8,392,000. At the time this report was completed (November 13, 2023), the Foundation’s investments balance was \$9,346,727.38, almost \$1 million more than the initial corpus.**

CONCLUSION

The Great Smokies Health Foundation still has plenty of work to do. The Foundation will need to be even more focused and intentional as it rolls out larger-scale, multi-year investments in health initiatives that produce more significant impact. There remains a need to diversify and expand our revenue streams. Sustainability will require adjustments in our Investment Policy Statements to ensure stronger annual earnings. It is also time to seek a new investment advisory partner group that has deeper knowledge in the most appropriate asset allocation strategy for a healthcare foundation to help us meet our long-term objectives.

The Great Smokies Health Foundation continues to evolve and grow, in no small part due to the steadfast, wise, and visionary leadership of its Board of Directors. The board of any nonprofit organization is usually the “forgotten” volunteer group. I would be remiss in my duties were I not to acknowledge the work of this Board of Directors – they are an extraordinarily skilled, thoughtful, and deeply caring group.

Mother Teresa, founder of the Roman Catholic order of the Missionaries of Charity, once wrote, “The miracle is not that we do this work, but that we are happy to do it.”

I hope those words reflect the sentiments of the Foundation’s entire staff, board of directors, and Sylva Thrift Shop volunteers – they certainly resonate deeply in my own heart.

Brian K. Huskey
Executive Director,
Great Smokies Health Foundation

II – STATEMENT OF FINANCIAL POSITION (Balance Sheet 09/30/2023)

ASSETS

September 30 2023

Current Assets	
Checking/Savings	
Temporarily Restricted	\$ 1,039.68
Unrestricted	
First Citizens Investment Acct.	\$ 9,231,072.15
Money Market Savings Acct (FC)	\$ 159,252.29
Operating Checking Acct (FC)	<u>\$ 14,502.96</u>
Total Unrestricted	<u>\$ 9,404,827.40</u>
Total Checking/Savings	\$ 9,405,867.08
Other Current Assets	
Investments – Jackson Co Indust	\$ 10,500.00
Sales Tax Receivable	\$ 1,336.01
Security Deposit on Lease	<u>\$ 900.00</u>
Total Other Current Assets	<u>\$ 12,736.01</u>
Total Current Assets	<u>\$ 9,418,603.09</u>
Fixed Assets	
Accumulated Depreciation	\$ -4,997.15
Gift Shop POS System	\$ 2,611.41
Computer hardware, software & peripherals	\$ 2,385.74
Thrift Shop Fixtures	<u>\$ 20,000.00</u>
Total Fixed Assets	<u>\$ 20,000.00</u>
TOTAL ASSETS	<u><u>\$ 9,438,603.09</u></u>

LIABILITIES & EQUITY

Liabilities

Current Liabilities	
Credit Cards	
FCB CC	<u>\$ 2,000.93</u>
Total Credit Cards	\$ 2,000.93
Other Current Liabilities	
Payroll Liabilities	
Payroll Taxes	
FICA	\$ 0.70
NC Withholding	<u>\$ 1,081.00</u>
Total Payroll Taxes	\$ 1,081.70
Sales Tax Liability Thrift Shop	<u>\$ 899.57</u>
Total Other Current Liabilities	<u>\$ 2,093.11</u>
Total Current Liabilities	\$ 4,094.04
Long Term Liabilities	
Grants & Donations Payable	
Breast Cancer Awareness Fund	\$ 575.05

Gas Cards for Cancer Patients	\$	30.00
Hospice/Palliative Care	\$	4,371.65
Urology Education Fund	\$	1,173.96
Total Grants & Donations Payable	\$	<u>6,150.66</u>
Total Long-Term Liabilities	\$	<u>6,150.66</u>
Total Liabilities	\$	10,244.70
Equity		
Operating Fund Equity	\$	1,517,315.95
Retained Earnings	\$	- 1,826,260.65
Temporarily Restricted Equity	\$	9,099,865.66
Net Income	\$	<u>637,437.43</u>
Total Equity	\$	<u>9,428,358.39</u>
<u>TOTAL LIABILITIES & EQUITY</u>	\$	<u>9,438,603.09</u>

III(A) – FY2022-23 COMMUNITY GRANTS SUMMARY

GRANTEE/PROGRAM (Counties Served)	AMOUNT	IMPACT
AWAKE Children's Advocacy Center: Standing in the Gap for Children (J,S)	\$5,000	Expanded capacity to serve 28.6% more clients than in prior year.
Blue Ridge Community Health Services: Behavioral Health Consumer Support Services (J,S,M,G)	\$5,000	Not known.
Catholic Charities - Diocese of Charlotte Expanding Western NC Reach (J,S,M,G)	\$5,000	Average of 251 individuals served per event (8 events total).
Center for Domestic Peace Direct Client Services General Funds (J)	\$5,000	>80% of clients receiving assistance report feeling better prepared for unsafe events.
Child Medical Collaborative, Inc. Regional Child Medical Collaborative (J,S,M,G)	\$5,000	Increased # of child victims receiving a timely CME by 44%
Graham County Health Department Dental Clinic Equipment Replacements (J,S,M,G)	\$5,000	Sustained capacity to serve same # of patients as seen in 2021-22.
Hands on Jackson 2022 Wheelchair Ramp Support (J)	\$4,000	5 accessibility ramps provided; outcome > 66% higher than projected.
HERE in Jackson County Homeless Management Info System Support (J,S,M,G)	\$5,000	Improved data entry and timeliness to leverage >\$86,000 in new ESG funding.
HIGHTS, Inc. Crisis Mental Health Support	\$5,000	126 served; 96% reduced specific problem behaviors; <13% overall recidivism rate.
Jackson County Department of Public Health Breast & Cervical Cancer Program (J)	\$5,000	16 pap screens, 12 colonoscopies, 2 Leep procedures provided to uninsured women.
Jackson County Department of Public Health Elevate828 Wellness Program (J)	\$5,000	50 participants; data still undergoing evaluation.
Jackson County Public Schools School Health Advisory Council – Walking Trails (J)	\$5,000	Grant amendment issued to extend completion to 12/31/2023.
Jackson Neighbors in Need Heating Assistance and Emergency Funding (J)	\$4,000	Leveraged with other funding, enabled assistance to 273 households.
KIDS Place Children's Advocacy Center Macon and Graham County CAC Support (J,G)	\$10,000	Provided trauma-informed care to 40 victims.
Macon County CareNet Hunger Relief Support (M)	\$3,000	Served 15,230, including 572 unduplicated students w/ backpack meal program.
REACH of Macon County Male Victims Outreach & Intervention (M)	\$3,000	Not known.

Rolling Start of NC Vehicle Refurbishing & Awarding (JMS)	\$5,000	5 refurbished vehicles provided to individuals/households w/o transportation.
Smokey Mountain Elementary School A Playground For All (J)	\$5,000	Grant amendment issued to extend project completion is pending.
Southwestern Child Development Commission Nurse Family Partnership (J,S,M,G)	\$5,000	Not known.
Southwestern Community College Surg-Tech Training Program Equipment (J,M,S)	\$4,669	Equipment serves 12 students per school year, 120 total over 10 years
Swain County Health Department Community Blood Outreach Program (S)	\$5,000	143 served; 76 w/o PCP were linked to care; w/ multiple health improvements.
Swain/Qualla SAFE General Operating & Program Support (S)	\$5,000	Sustained normal operations; able to cover costs not billable to other grant sources.
Sylva Community Garden Water System Upgrades (J)	\$800	Stabilized and improved water delivery system.
The Community Table General Operating & Program Support (J)	\$5,000	Sustained normal operations; able to cover costs not billable to other grant sources.
The Giving Spoon Program Supplies	\$5,000	Average of 1,100 meals provided weekly.
Together We Raise Swain County Keep Walking (S)	\$2,000	Not known.
Uncomplicated Kitchen Community Cooking Classes (J)	\$5,000	Exceeded projected outcome (140 class attendees with 10 classes) by 40%.
United Christian Ministries of Jackson County Program Support (J)	\$5,000	See Guidestar link .
Vecinos, Inc. General Operating Support (J,S,M,G)	\$5,000	Enrolled and served 12 new uninsured patients.

TOTAL COMMUNITY GRANTS = \$135,118

III(B) – FY2022-23 SPECIAL PURPOSES GRANTS SUMMARY

GRANTEE/PROGRAM (Counties Served)	AMOUNT	IMPACT
Grace Place/Five Point Center Capital Support for Kitchen Expansion (G)	\$15,000	Preserved project's CDBG award; catalyzed >\$120k in funding from other sources.
Jackson County Fire & Life Safety Home CO Detectors (J)	\$1,020	CO detectors installed in 36 homes that did not have detectors.
Sylva Police Department Community Care Program Bridge Funding (J)	\$5,000	Sustained program operations for 6 weeks between funding sources.
Center for Domestic Peace SANE Support Program Capital Equipment Needs (J)	\$23,285	Equipment is pending final installation.

TOTAL SPECIAL PURPOSE GRANTS = \$ 43,305

IV(A) – FY2023-24 COMMUNITY GRANTS SUMMARY

GRANTEE/PROGRAM (Counties Served)	AMOUNT	PROJECTED IMPACT
<u>AWAKE Children’s Advocacy Center</u> (2 awards) Jackson/Swain County Operating Support and Swain County Expansion (J,S)	\$20,000 (2 years)	<p>OUTCOME 1) Grantee shall provide services to no fewer than 60 households for each grant year (total of 120 to be served during the entire 2-year grant term).</p> <p>OUTCOME 2) Grantee’s child advocacy calls and visits will ensure that no fewer than 75% of children served remain in safe placements that decrease the likelihood that children will be re-victimized.</p> <p>OUTCOME 3) With availability of services in Swain County, wait times for forensic interviews and child medical exams shall decrease to no more than 72 hours.</p>
<u>Center for Domestic Peace</u> Intervention and Outreach Services (J)	\$15,000 (2 years)	<p>OUTCOME 1) 1,140 Jackson County high school and middle school students will be provided outreach materials and information on domestic violence, sexual assault, and human trafficking during the grant period (570 during Year 1).</p> <p>OUTCOME 2) 80% of clients receiving three (3) or more client services and/or material financial assistance will self-report feeling safer and demonstrate increased knowledge of more ways to plan for their safety.</p>
<u>Child Medical Collaborative</u> Operations and Technology Support (J,S,M,G)	\$15,000 (2 years)	<p>Grantee will continue provision of Child Medical Evaluations (CMEs) for victims of child abuse and maltreatment. Use of Foundation funds is limited to operations and technology support in Jackson, Graham, Macon, and Swain counties.</p> <p>OUTCOME 1) Year 1: Percentage of children receiving CMEs will increase 50% from baseline of 200 children receiving CMEs in calendar year 2022.</p> <p>OUTCOME 2) Year 2: Percentage of children receiving CMEs will increase 60% from baseline of total number of children receiving CMEs from 2-year average of children receiving CMEs in calendar years 2022 and 2023.</p>
<u>East Carolina University - School of Dental Medicine</u> Sylva Community Service Learning Center (J,S,M,G)	\$7,500 (1 year)	<p>Replace non-functional handpiece equipment critical to provision of endodontic care and oral/maxillofacial surgery.</p> <p>OUTCOME 1) Baseline: The CSLC-Sylva’s current percentage of endodontics and surgery procedures compared to the total number of procedures has been about 7.5%. Outcome: percentage of endodontics and surgery procedures should increase to 8.5% or greater.</p>
<u>Giving Spoon, Inc.</u> Operating and program support (S)	\$10,000 (2 years)	<p>OUTCOME 1) Grantee shall provide no fewer than 4,300 meals per month throughout the course of each grant year.</p> <p>OUTCOME 2) Grantee shall operate 7 hot meal delivery routes, 2 days per week, serving an average of 150 households per week throughout the course of each grant year.</p>
<u>Graham County Health Department</u> Increasing Access to Oral Health Care (G)	\$6,200 (1 year)	<p>OUTCOME 1) Grantee will acquire and replace 16-year-old dental clinic air compressor.</p> <p>OUTCOME 2) Grantee dental clinic will serve an average of 30 new patients each month for the duration of the 1-year grant term.</p>
<u>HERE in Jackson County</u> Homeless Management Information System (J,S,M,G)	\$10,000 (2 years)	<p>OUTCOME 1) Leverages more than \$86,000 in federal funding each grant year.</p>
<u>Jackson County Department of Public Health</u> Cullowhee Community Garden	\$10,500 (2 years)	<p>OUTCOME 1) The Cullowhee Community Garden will erect a new shed for storage of supplies and equipment essential to garden operations.</p>

(J)		<p>This shed will replace an existing structure that is unstable and potentially hazardous.</p> <p>OUTCOME 2) The Cullowhee Community will contract with student intern(s) for summer and fall growing seasons for a total of 200 hours (100 hours in each year) work to ensure maximum yield in the absence of adequate volunteer labor. Anticipated yield increase of 15% during internship periods.</p> <p>OUTCOME 3) Revitalization of abandoned 15' X 30' plots will yield additional 25 lbs. during summer season and 20 lbs. during fall season during each of the next two (2) years.</p> <p>OUTCOME 4) 28.5% increase overall yield of vegetables and fruit, with no less than 200 lbs. directed to Community Table and United Christian Ministries.</p>
<p>Jackson County Department of Public Health Elevate828 Wellness Program (J)</p>	<p>\$15,000 (2 years)</p>	<p>Grantee will continue to carry out the six (6) month Elevate 828 community-wide wellness program available to all adult residents in Jackson County over the age of 18. During the 2023-2024 cycle of Elevate 828, the program will expand participation opportunities to local businesses for the benefit of their employees. Data will be collected via pre- and post-screenings administered by JCDPH staff.</p> <p>OUTCOME 1) 20% of participants will maintain a healthy weight and BMI.</p> <p>OUTCOME 2) 20% of participants will reach or maintain a healthy glucose level with an AC1 score no higher than 5.7%.</p> <p>OUTCOME 3) 20% of participants will reach or maintain a healthy total cholesterol level of around 150mg/dL.</p> <p>OUTCOME 4) 20% of participants will have improved blood pressure level, close to the normal level of 120/80 mm HG.</p> <p>OUTCOME 5) 25% of participants will report an increase in the amount of physical activity and nutrition improvements.</p> <p>OUTCOME 6) 100% of participants who receive a positive Hepatitis C result when screened will receive education, support, and information available on treatment opportunities through referral to the Hepatitis C Bridge Counselor at JCDPH.</p> <p>OUTCOME 7) 10% of participants who identified as having no usual primary care provider will establish a medical home with a usual primary care provider after program completion.</p>
<p>Jackson County Department of Public Health Safe Kids Jackson County (J)</p>	<p>\$8,000 (2 years)</p>	<p>Grantee will: 1) Build and stock three (3) more life jacket loaner stations in Jackson County; and 2) Supplement JCDPH Car Seat Program and to provide for the cost of Car Seat Technician Certification Training of local fire department members.</p> <p>OUTCOME 1) Prevent drownings in children and adults.</p> <p>OUTCOME 2) Install and stock three (3) new life jacket loaner stations. Life jacket use will be monitored by an inventory system and restocking of life jacket loaner stations each week.</p> <p>OUTCOME 3) Train at least one (1) member of each county fire department as a Certified Car Seat Technician to perform education and car seat checks for the community.</p>
<p>Jackson County Fire & Life Safety Middle School CPR, AED, and First Aid Instruction (J)</p>	<p>\$9,000 (2 years)</p>	<p>Grantee will continue to provide CPR, AED, and First Aid training throughout Jackson County middle schools. Upon graduating 8th grade, youth are certified in Basic First Aid, and adult CPR & AED use, with an extensive knowledge of life safety skills. Grantee will also continue to provide community CPR classes open to all Jackson County citizens at no charge.</p>

		<p>OUTCOME 1) Approximately 600 Jackson County 8th grade students will be certified in CPR, AED, and Basic First Aid during the 2-year grant term (300 students each year for 2 years).</p> <p>OUTCOME 2) Increase proportion of children and adolescents who increase knowledge and resilience to challenges and stress by learning appropriate response in a medical crisis, demonstrated by a pre- and post-class survey to be created, administered, and collected by the Grantee.</p>
<p>Jackson County Public Library Access. Period. (J)</p>	<p>\$3,650 (1 year)</p>	<p>Fontana Regional Library / Jackson County Public Library will install feminine hygiene product dispensers in all seven (7) public bathrooms and stock the dispensers with free pads and tampons. In future years, the library budget will fund refill supplies. Grantee will also create a resource list, accessible by QR code, to collect feedback survey data and to help people learn about menstruation.</p> <p>OUTCOME 1) Grantee will purchase and install dispensers. OUTCOME 2) Grantee will provide foundation with quarterly reports on user survey data. OUTCOME 3) Grantee will also provide reports to the Foundation as described in Section IV(D) herein.</p>
<p>Jackson County Public Library Hydration Refill Station (J)</p>	<p>\$2,050 (1 year)</p>	<p>Grantee will purchase and install touch-free water fountain retrofit kits at all existing water fountains in the Jackson County Public Library.</p> <p>OUTCOME 1) Grantee will acquire and install touch-free water fountain retrofit kits. OUTCOME 2) Grantee will provide foundation with quarterly reports on user survey data. OUTCOME 3) Grantee will also provide reports to the Foundation as described in Section IV(D) herein.</p>
<p>Macon County Care Network Hunger Relief Program Support (M)</p>	<p>\$6,000 (1 year)</p>	<p>Macon County Care Network will continue to provide hunger relief to those in need in Macon County, North Carolina.</p> <p>OUTCOME 1) Grantee will provide 17,000 food backpacks to an average of 600 unduplicated schoolchildren during the grant term. OUTCOME 2) Grantee will distribute 500,000 lbs. of food to 10,000 households during the grant term.</p>
<p>Mountain Projects Hands on Jackson (J)</p>	<p>\$10,000 (2 years)</p>	<p>Hands on Jackson will use Great Smokies Health Foundation funds to purchase materials and supplies needed to construct accessibility ramps for qualifying households.</p> <p>OUTCOME 1) At least eight (8) homes with residents who have mobility issues will receive accessibility ramps, improving their access to health care and overall quality of life.</p>
<p>Mountain Projects Jackson Neighbors in Need (J)</p>	<p>\$10,000 (2 years)</p>	<p>Grantee will provide Heating Assistance for Jackson County households in need of such assistance beginning in November of each grant year extending through such period that the \$5000.00 award for each grant year from Great Smokies Health Foundation is exhausted. After Foundation funds for heating assistance are fully expended, Grantee will pay heating assistance requests from other sources. Grantee to pay Duke Energy directly on behalf of clients/beneficiaries.</p> <p>OUTCOME 1) At least 20 unduplicated Jackson County households will be provided heating assistance with Foundation funds during each grant period.</p>
<p>Rolling Start NC, Inc. Vehicles for People in Need (J)</p>	<p>\$10,000 (2 years)</p>	<p>Grantee will continue to accept donated vehicles and to refurbished them to safe, reliable, and presentable vehicles to be awarded at no cost to Jackson County residents in need of personal transportation and without the financial means to acquire it on their own. Grantee will, to the greatest degree possible, prioritize Foundation-funded vehicles to</p>

		<p>individuals and/or households with serious medical conditions for whom lack of transportation has been a barrier to accessing healthcare.</p> <p>OUTCOME 1 Grantee will refurbish and award twelve (12) vehicles to eligible individuals during the grant term (6 vehicles each year).</p>
<p>Swain/Qualla SAFE, Inc. General Operating Support (S)</p>	<p>\$15,000 (2 years)</p>	<p>Swain/Qualla SAFE will continue to provide a full range of crisis and victim advocacy services for victims of domestic violence and sexual assault. Great Smokies Health Foundation funding will support general operating costs, including accounting services and external audit costs.</p> <p>OUTCOME 1 75% of those receiving shelter and services will exit to positive housing placements that reduce the likelihood they will be revictimized.</p> <p>OUTCOME 2 60% of those receiving shelter and services who are unemployed at entry will secure employment and increase their earned income.</p>
<p>Town of Sylva/Sylva Police Department Community Care Expansion Project (J)</p>	<p>\$8,000 (2 years)</p>	<p>Grantee will continue to provide social services response to calls for police service that are non-criminal matters, relate to unhoused persons and individuals suffering from substance use disorders and/or mental health crises. Specific conditions include:</p> <p>1) Implementation of the use of the Vulnerability Index-Service Prioritization Decision Assistance Tool (VI-SPDAT) to assess, triage, and appropriately refer unhoused persons for permanent housing placement and supportive services; and</p> <p>2) Regular participation in NC Balance of State Continuum of Care Region 1 (Jackson County) Coordinated Entry/case conference meetings to ensure referrals for permanent housing are appropriately prioritized.</p> <p>OUTCOME 1 30% reduction in calls for police service for the same individuals.</p> <p>OUTCOME 2 50% of individuals served (unduplicated count) will successfully access and engage appropriate client-directed services and resources.</p>
<p>Uncomplicated Kitchen Community Cooking Studio (J)</p>	<p>\$12,000 (2 years)</p>	<p>Uncomplicated Kitchen will establish a permanent brick and mortar location projected to open in early 2024. Foundation funding will enable the following outcomes:</p> <p>Outcome 1 At least 500 total unduplicated students will participate in class offerings (250 each year for two (2) years.</p> <p>Outcome 2 50% our students will demonstrate increased food literacy measured across multiple areas of knowledge and skills.</p> <p>Outcome 3 Students will demonstrate at least a 50% increase in the amounts of fruits and vegetables they consume.</p> <p>Outcome 4 Students will demonstrate at least a 50% increase in the amounts of legumes and whole they consume.</p> <p>Outcome 5 Students will demonstrate a 50% decrease in the amounts of processed foods they consume. Outcome data will be collected through an online pre- and post-class surveys distributed, collected, and analyzed by Uncomplicated Kitchen staff.</p>
<p>United Christian Ministries of Jackson County Food Pantry Support & Equipment Improvement (J)</p>	<p>\$7,500 (1 year)</p>	<p>Grantee will continue to provide healthy, nutritious food for its clients and improve its capacity to do so through procurement of an additional freezer.</p> <p>OUTCOME 1 Purchase of new freezer enables 20% increased food storage capacity over current capacity.</p> <p>OUTCOME 2 Reduction of food waste.</p> <p>OUTCOME 3 Increase in quantity of food available to clients.</p>
<p>Vecinos, Inc.</p>	<p>\$15,000 (2 years)</p>	<p>Grantee will continue to provide free integrated healthcare to uninsured adults in Graham, Jackson, Macon, and Swain counties.</p>

<p>Support for Bilingual Integrated Healthcare (J,S,M,G)</p>		<p>OUTCOME 1) Percentage of patients 18-75 years of age with diabetes who had adequately controlled hemoglobin HbA1c under 9.0% during the reporting period. Baseline: 62.5%; Target: 69.84%</p> <p>OUTCOME 2) Percentage of patients 18-85 years old who had a diagnosis of Hypertension (HTN) overlapping the reporting period and whose most recent Blood Pressure (BP) was adequately controlled (less than 140/90 mm Hg) during the reporting period. Baseline: 60%; Target: 64.85%</p> <p>OUTCOME 3) Percentage of patients aged 18 years and older with BMI documented during the most recent visit or within the reporting period to that visit AND, who had a follow-up plan documented if the most recent BMI was outside of normal parameters. Baseline: 61.42%; Target: 66.04%</p> <p>OUTCOME 4) Percentage of patients aged 18 years and older who were screened for tobacco use one or more times within 24 months and received tobacco cessation intervention if identified as a tobacco user. Baseline: 68.95%; Target: 74.01%</p> <p>OUTCOME 5) Percentage of patients screened for depression on the date of the visit or 14 days prior to the date of the visit using an age-appropriate standardized depression screening tool AND, if screening was positive, had a follow-up plan documented on the date of the visit. Baseline: 70.04 %; Target: 75%</p>
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TOTAL COMMUNITY GRANTS = \$225,400

IV(B) – FY2023-24 TARGETED HEALTH IMPACT GRANTS SUMMARY

GRANTEE/PROGRAM (Counties Served)	AMOUNT	PROJECTED IMPACT
<p>Blue Ridge Free Dental Clinic Increasing Access to Oral Healthcare Through Community Collaboration (J,M,S)</p>	<p>\$15,000 (1 year)</p>	<p>The Blue Ridge Free Dental Clinic will increase access to oral health care through community collaboration by increasing the number of "Partner Days" with a variety of nonprofit and government organizations. Services shall be provided at no cost to patients.</p> <p>OUTCOME 1) 140 new patients will be seen at the Blue Ridge Free Dental Clinic through increase in number of "Partner Days."</p> <p>OUTCOME 2) Decrease average wait time for a new patient from a partner organization from 42 days to 21 days for 90% of patients.</p> <p>OUTCOME 3) Reduce the number of adults with active or untreated dental decay, dental caries, and/or periodontitis. 90% of patients will complete a full oral health treatment plan resulting in complete oral health restoration.</p> <p>OUTCOME 4) Increase preventative oral health care to reduce decay by performing two (2) hygiene procedures during a round of dental care and deliver oral health education to improve home care. 80% of patients will demonstrate reduced surface decay within 12 months.</p> <p>OUTCOME 5) Improve patient experience by accommodating specific needs during encounter points. The Clinic and partner organizations will collaborate to identify patient needs, including transportation, translation and interpretation, private scheduling, social-emotional needs, medical history, and appropriate language resources. 95% of patients completing a patient satisfaction report will self-report they were satisfied with the patient experience they received through the partnership.</p>
<p>The Community Table Sneaky Nutrition: The Easy Eats Program (J)</p>	<p>\$30,000 (2 years)</p>	<p>Sneaky Nutrition, publicly known as the "Easy Eats Program" is our way of bringing in-house food and culinary literacy to the clients at the Community Table will collaborate with Uncomplicated Kitchen to present simple, nutritionally balanced recipes and food preparation techniques in short, easy to understand learning sessions. Grantee will provide a steady supply of staple, and seasonally fresh, items for students/clients to sustain the skills learned in the classes. This program will engage clients (regardless of age, ethnicity, gender, sex, nationality, ability, or income) in cooking nutrient-dense dishes using fresh vegetables, fruits, whole grains, and/or legumes, combined with the pantry staples most frequently found at food pantries.</p> <p>OUTCOME 1) Proportion of food insecure households in Jackson County will remain level or decrease, based on North Carolina Institute of Medicine (NCIOM) County Health Data Profile.</p>

<p>HIGHTS, Inc. Increasing Access to Behavioral Health Care for Youth in Underserved Communities (J,G)</p>	<p>\$30,000 (2 years)</p>	<p>HIGHTS, Inc. will hire two (2) associate licensed therapists and one part-time fully licensed therapist to expand behavioral health counseling services to children and families in Western North Carolina. One FT therapist will work in Graham County Public Schools, and the other therapist will serve youth in the Jackson County Department of Social Services custody. OUTCOME 1) Increase in number of youth and families receiving behavioral health counseling. Projected Year 1: at least 20 youth for each therapists' caseload the first year (40 total). Projected Year 2: at least 25 youth the following year, (50 total.) Two years total: 90 OUTCOME 2) At least 90 youth residing in Graham County will receive behavioral health evaluations over the two-year grant period. OUTCOME 3) Youth involved in juvenile justice will be diverted from further involvement evidenced by: 3(A): 85% Youth will not have new adjudications after admission to the program. 3(B): 85% Youth will not have new complaints filed after admission to the program. 3(C): 85% of Youth who have at least eleven unexcused absences and participate in counseling will increase attendance and if absent, will have the majority of absences categorized as an excused absence.</p>
<p>Jackson County Department of Public Health Women's Health Services Expansion (J)</p>	<p>\$30,000 (2 years)</p>	<p>Grantee will use Foundation funds to scale-up the existing Women's Health Services offered at the JCDPH, specifically Family Planning, Maternal Health, and the Breast and Cervical Cancer Control Program (BCCCP). Grantee's program scale-up includes medically necessary next level care for our women's health patients through the purchase of equipment, medical devices, hiring an ultrasound technologist, and paying for particular health procedures when clinically indicated as appropriate. OUTCOME 1) Prevent pregnancy by means of a LARC method in 25% of JCDPH Women's Health services patients. OUTCOME 2) Increase the proportion of pregnant women in Jackson County who receive early and adequate prenatal care to 40%. OUTCOME 3) Increase the proportion of women in Jackson County screened for cervical cancer by 6%. OUTCOME 4) By 2025, provide 30 colposcopies to uninsured or low-income women, resulting in early detection of precancerous cells or cancerous cells. OUTCOME 5) By 2025, provide 6 loop electrosurgical excision procedures (LEEP's), as further follow up for diagnostic testing or treatment based on abnormal cervical screenings and/or abnormal colonoscopy results.</p>
<p>Swain County Health Department Community Bloodwork Outreach Program (S)</p>	<p>\$30,000 (2 years)</p>	<p>Grantee will scale-up the existing Community Bloodwork Outreach Program to expand its reach and impact. OUTCOME 1) Baseline: Data from last year's program indicated that the majority of participants faced barriers to accessing healthcare services due to financial constraints or the absence of a primary care provider. Outcome: By the end of the grant period (2024), the program will provide free blood lab screenings to a minimum of 200 individuals who faced barriers to healthcare access, thereby expanding its reach to underserved populations. OUTCOME 2) Increase in number of persons with a Primary Care Provider (PCP). Baseline: Out of 143 participants in last year's program, 76 did not have a primary care provider before the event. Outcome: By the end of</p>

		<p>the grant period (2024), at least 90% of participants without a primary care provider in the Community Bloodwork Outreach Program will have established a primary care provider relationship with the Swain County Health Department Clinic.</p> <p>OUTCOME 3) Increased awareness of health risks in program participants. Baseline: No previous data on the awareness of health risks among community members. Outcome: By the end of the grant period (2024), at least 80% of program participants will demonstrate increased awareness of their individual health risks and the importance of preventive care.</p> <p>OUTCOME 4) Increased participation in Swain Summits Program. Baseline: Limited engagement of program participants in the Swain Summits program, a county-wide wellness initiative. Outcome: By the end of the grant period (2024), the program will achieve a 10% increase in the number of participants actively involved in the Swain Summits program and engaging in health-promoting activities throughout the year.</p>
<p>Uncomplicated Kitchen Sneaky Nutrition: The Easy Eats Program (J)</p>	<p>\$30,000 (2 years)</p>	<p>Grantee will implement, operate, and expand Sneaky Nutrition, publicly known as the “Easy Eats Program,” to provide in-house food and culinary literacy to the clients at the Community Table, the collaborative partner for this program. Uncomplicated Kitchen will present simple, nutritionally balanced recipes and food preparation techniques in short, easy to understand learning sessions. The Community Table will provide a steady supply of staple, and seasonally fresh, items for students/clients in to sustain the skills learned in the classes. This program will engage clients (regardless of age, ethnicity, gender, sex, nationality, ability, or income) in cooking nutrient-dense dishes using fresh vegetables, fruits, whole grains, and/or legumes, combined with the pantry staples most frequently found at food pantries.</p> <p>OUTCOME 1) Proportion of food insecure households in Jackson County will remain level or decrease, based on North Carolina Institute of Medicine (NCIOM) County Health Data Profile.</p>
<p>Vecinos, Inc. Community Health Hub SDOH Staff Services (J,M,S,G)</p>	<p>\$30,000 (2 years)</p>	<p>Funding from the Great Smokies Health Foundation will support the Patient Navigator position. The Patient Navigator is a bridge (A) for patients within Vecinos’ own services, (B) to accessing external referrals and resources, and (C) to establish care with patients identified through services conducted under the auspices of the established MOUs with the 30th Alliance and Pisgah Legal Services. The first year of the project, Vecinos will focus primarily on improving the infrastructure for establishing or continuing to accept new patient referrals; sending out external referral requests; and successfully completing warm, in-person referral hand-offs to the Hub’s partner organizations. In Year 2 of the grant, the Patient Navigator will continue addressing these issues.</p> <p>OUTCOME 1) Percentage of patients 18-75 years of age with diabetes who had adequately controlled hemoglobin HbA1c under 9.0% during the reporting period. Baseline: 62.5%; Target: 69.84%</p> <p>OUTCOME 2) Percentage of patients 18-85 years old who had a diagnosis of Hypertension (HTN) overlapping the reporting period and whose most recent Blood Pressure (BP) was adequately controlled (less than 140/90 mm Hg) during the reporting period. Baseline: 60%; Target: 64.85%</p> <p>OUTCOME 3) Percentage of patients aged 18 years and older with BMI documented during the most recent visit or within the reporting period to that visit AND, who had a follow-up plan documented if the most recent BMI was outside of normal parameters. Baseline: 61.42%; Target: 66.04%</p> <p>OUTCOME 4) Percentage of patients aged 18 years and older who were screened for tobacco use one or more times within 24 months and</p>

		<p>received tobacco cessation intervention if identified as a tobacco user. Baseline: 68.95%; Target: 74.01%</p> <p>OUTCOME 5) Percentage of patients screened for depression on the date of the visit or 14 days prior to the date of the visit using an age-appropriate standardized depression screening tool AND, if screening was positive, had a follow-up plan documented on the date of the visit. Baseline: 70.04 %; Target: 75%</p>
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TOTAL TARGETED HEALTH IMPACT GRANTS = \$195,000

GRANTEE AGREEMENTS AND REPORTING

The impacts for each grant noted herein represent the detail in each grant agreement. Staff conducted conference calls with all FY2023-24 grantees to develop mutually agreeable outcomes measures. Individualized reporting documents have been created for each grantee based on these measures.

Staff will provide technical assistance to all grantees to ensure their understanding of these reporting mechanisms and amend any data sets being tracked as needed.

V – GRANTMAKING TRENDS 2015 – 2024

The Great Smokies Health Foundation’s “Thrift Store Grants” program was originally created in 2014 to continue the legacy of giving from the proceeds of the Jackson County and Swain County Thrift Shops. In 2021, the program was renamed the Community Grant Program and the Foundation expanded funding availability to Macon and Graham Counties. Table V(A) shows the Community Grant funding for 2015-2024. For FY2023-24, the Foundation shifted to a 2-year funding cycle. However, agencies that were awarded funds for 2 years must meet Year 1 outcomes and be fully compliant in all reporting to receive Year 2 funding. The Targeted Health Impact Grants and High Impact Health Initiatives that resulted from the Foundation’s strategic planning process that concluded in May 2023 are shown in Table V(B).

Table V(A)

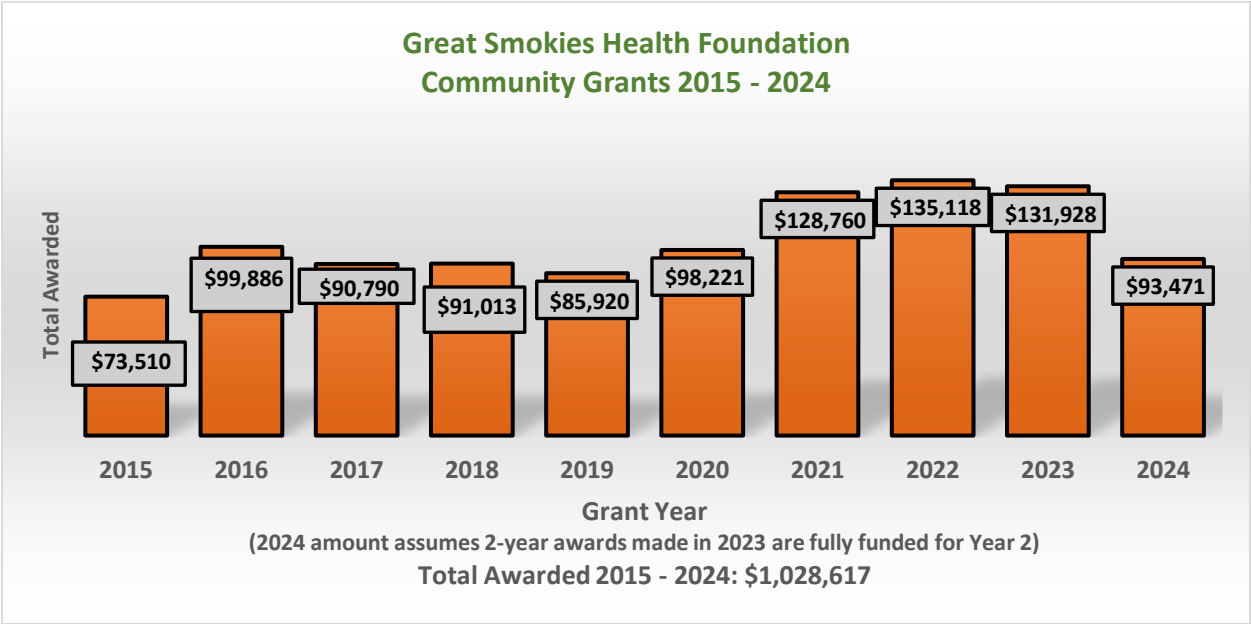
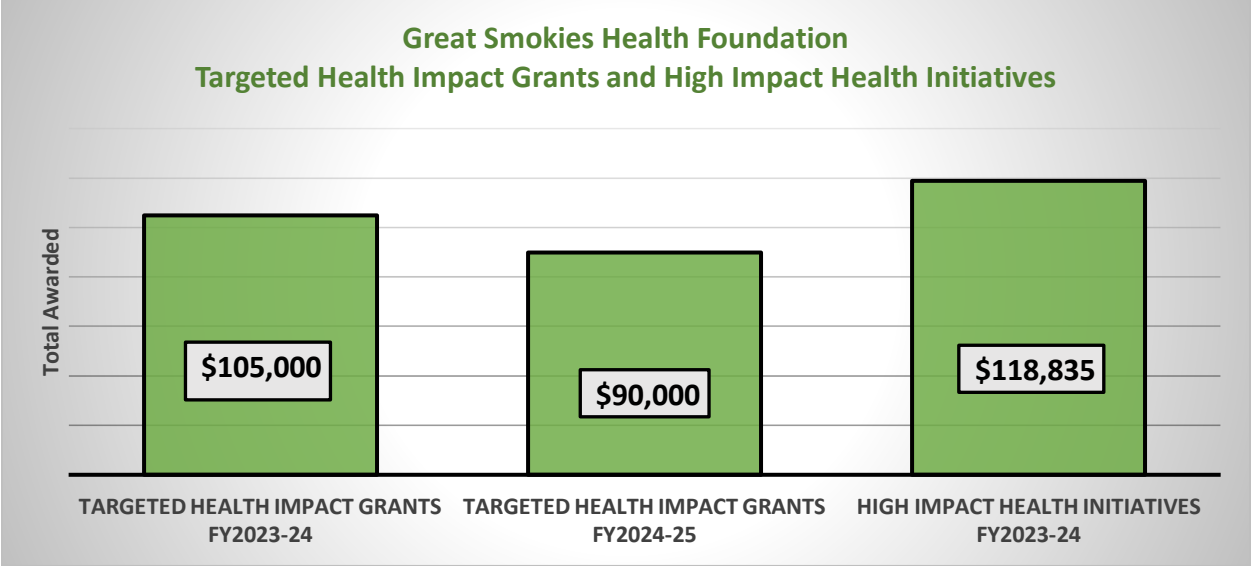


Table V(B)



VI – INVESTMENT PORTFOLIO HIGHLIGHTS 2015 –2023

The full **\$8,392,000** initial corpus of the Great Smokies Health Foundation investment portfolio was received in three installments over the course of five years, shown in Table VI(A) below. Table VI(B) shows the timeline of key events in the Foundation’s investments from 2015 through September 30, 2023.

Table VI(A)

DATE	AMOUNT
June 30, 2015	\$ 1,500,000
January 31, 2017	\$ 1,292,000
August 18, 2020	\$ 5,600,000
TOTAL	\$ 8,393,000

Table VI(B)

06/30/2015	\$1,500,000	Initial Hospital Sale Proceeds
01/20/2017	\$ 2,802,030	After 2nd disbursement of \$1,292,000
08/18/2020	\$ 8,930,215	After final disbursement of \$5,600,000
12/31/2021	\$ 11,264,808	Peak of portfolio value
09/28/2022	\$ 8,589,847	Lowest value since market volatility began in May 2022
06/30/2023	\$ 10,056,094	Highest value since market volatility began in May 2022
08/31/2023	\$ 9,598,306	Value after \$500,000 withdrawal for grants/operations
09/30/2023	\$ 9,231,072	Ending value FY 2022-23

Discussions with several foundation peers across the state and two investment advisory groups led to a deeper dive into the Great Smokies Health Foundation Investment Policy Statement (IPS). The Foundation’s most recent IPS was implemented in February 2016. Much has occurred in the world financial markets since then.

While the volatility in financial markets over the last eighteen months has been unpleasant, it is important to remember:

- Market declines are always temporary, with an average duration of 19 months;
- The ensuing recovery periods since 1950 have been of much longer duration (an average of 54 months);
- The average total investment return in recovery periods is 152%.

Analyses of the Great Smokies Health Foundation’s ISP, asset allocation, and investment performance conducted by two advisory groups show the need for multiple improvements, including:

- Greater detail regarding roles and responsibilities of the parties;
- Clarity on representative indices and target minimum and maximum weightings;

- Minimum requirements for investment managers, including performance monitoring, definitions of performance criteria, and conditions for termination of an investment advisor/manager;
- Specificity regarding IPS review timeframes, parameters for rebalancing portfolio holdings, and monitoring costs; when rebalancing would happen and how would it be measured;
- Clarification of asset class ranges and classes; defined targets within each; and the style of weighting within each class;
- Need to increase holdings in equities to the 75%-80% that is typical for most foundations and endowments (the Foundation's current equity holdings are at roughly 68%);
- Less emphasis on passive index funds and ETFs (the Foundation's current holding are nearly 90% passive; a 50-50 mix of active and passive is the recommended balance for most foundations and endowments);
- Need for review of all fees, commissions, and expense ratios.

Both firms compared the performance of the Great Smokies Health Foundation's investments to peer clients with less than \$25 million in net assets. Using blended benchmarking these analyses showed the Foundation's returns to be an average of 1.88% lower than those of our peers. Hypothetical increases in equity allocations to 75% - 80%, especially in small- and mid-cap sectors, showed our returns to be as much as 3.9% lower.

The Foundation's investment performance likely can be improved with less risk and lower costs by updating our ISP. It is also worth considering proposals from different investment advisory groups.

VII – LOOKING AHEAD: HIGH IMPACT HEALTH INITIATIVES

Staff continue to advance the Great Smokies Health Foundation's plans to fund larger, highly focused, multi-year initiatives in key Social Determinants of Health core objectives.

A series of meetings with school district leadership from Graham, Macon, and Swain counties have been completed. Foundation Board member Jake Buchanan, Deputy Superintendent of Jackson County Public Schools (JCPS), along with key JCPS staff leading Project AWARE have identified each county's needs to begin to implement initial components of Project AWARE in their schools. This effective, evidence-based child and adolescent mental health initiative represents "low hanging fruit" funding options for the Foundation, using an existing framework that can be replicated and customized to meet each district's needs. Specific year-over-year performance and evaluation metrics will be developed to ensure grantee accountability and efficacy of Foundation grantmaking in these efforts.

Foundation staff have engaged multiple discussions with the western chapter of the North Carolina Oral Health Collaborative (NCOHC). This group conducted a planning meeting in October to create strategies to address both consumer-level and systemic barriers to accessing oral health and accelerate the implementation of policies that reduce oral health disparities. A focus report on the results of the NCOHC's regional planning meetings will be released in

January. This report will help guide the Foundation’s efforts to strengthen and expand collaborations with existing grantees working on oral health care (Blue Ridge Free Dental Clinic, East Carolina School of Dental Medicine, Graham County Health Department Dental Clinic) and potential new partners (both providers and funders).

The Foundation’s initial High Impact Health Initiative Grant to assist Graham County Health Department to fully staff its Primary Health Care Clinic has already far exceeded expectations. In September alone, the Clinic saw a 386% increase in the number of new patients seen compared to September 2022. While Medicaid and insurance billing reports are still pending at the time this report was completed, initial data indicate this initiative will be fully self-sustaining within nine months.

VIII – CONCLUSION

The Great Smokies Health Foundation, while relatively small compared to its peer hospital conversion legacy foundations in the region, continues to advance its mission. Intentional, well-planned, and strategically focused collaborations and grantmaking will build on its core strengths.

North Carolina’s Medicaid expansion, scheduled to begin on December 1, 2023 presents opportunities and challenges. The ongoing shortage of providers, exacerbated by lower pay scales and a chronic lack of affordable housing will be a potential impediment to optimizing the win gained by years of advocacy to expand Medicaid in the state. The

With more than 600,000 North Carolinians now able to access benefits and healthcare, one of the key challenges for the region served by the Foundation will be to help build out and support a pipeline of healthcare providers who are passionate about working in rural areas and unafraid of the challenges of such work.

The Great Smokies Health Foundation will continue its nimble, community-focused approach to grantmaking and be a leader for bold, creative, and impactful investment for improvement in the health and wellness of our neighbors in Jackson, Swain, Graham, and Macon counties.