

2021

# Annual Report to the Community

# A letter from leadership

We continue to be amazed by the generosity of our community in supporting numerous nonprofit agencies delivering on their mission to serve those in need. We are fortunate to call the St. Croix Valley our home. Your interest and desire to listen, advocate, volunteer and support has never been more appreciated and necessary than it has been this past year. Many may have expected COVID-19 to have become a year-old memory by this time, but the pandemic lingered and continued to tax our health care system and our resources.

Our front-line workers and support staff have been remarkable in their commitment to and delivery of outstanding care for our patients in both the hospital and in our clinics. We are grateful to them all.

Philanthropy made a difference in 2021. This annual report highlights the impact contributions have made: charitably funded programs that address the needs of our community; capital medical equipment; spaces to more fully serve our patients. Your partnership continues to make good happen in our community.

A final note: We're pleased to introduce and welcome the newest member of the Lakeview family, President Brandi Lunneborg, who now replaces Ted Wegleitner in his retirement. And we appreciate the steady hand Nate Pulscher provided during the transition of leadership.

Thank you for your kindness and your commitment. We are truly blessed and forever grateful.



**Paul Erickson**  
Executive Director  
Lakeview Health Foundation



**Nathan Pulscher**  
Former Interim President  
Senior Vice President,  
Ancillary Services  
Lakeview Hospital



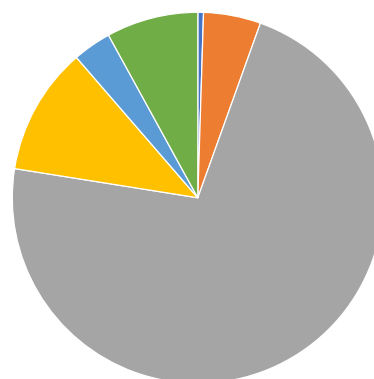
**Brandi Lunneborg**  
President, Lakeview  
Health and St. Croix  
Valley Executive Leader

# Lakeview Health Foundation

## 2021 financial summary\*

### Total revenue: \$2,827,525

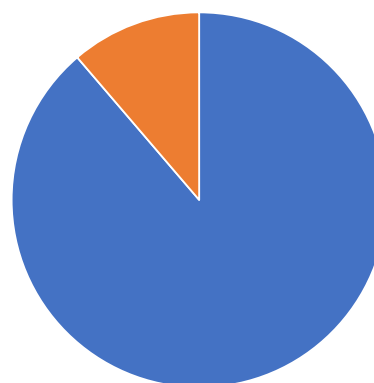
Contributions	\$2,506,665
Miscellaneous income	\$94,903
Investment income**	\$225,957



■ .5% Community Groups	■ 5% Corporations	■ 72% Foundations
■ 11% Individuals	■ 3.4% Other (non-operating)	■ 8% Investments (non-operating)

### Total expenses: \$1,874,092

Program expenditures	\$1,662,978
Other expenditures	\$211,114



■ 89% Programs/grant expenses	■ 11% Admin/fundraising expenses
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## Statement of financial position

### Total assets: \$8,854,166

Cash & cash equivalents	\$5,058,295
Accounts receivable	\$122,832
Investments	\$3,673,039

**TOTAL ASSETS** **\$8,854,166**

### Total liabilities & net assets: \$8,854,166

Accounts payable accruals	\$273,034
Annuity payable (long-term)	\$27,092
Net assets	\$8,554,040

**TOTAL LIABILITIES & NET ASSETS** **\$8,854,166**

\*As our programs access their funds, the use of monies from the funds are shown as expenditures to the foundation for programs such as PowerUp, Hospice, Prescription Assistance, Diabetes Education. There will not always be corresponding revenue to offset the expenses because the dollars in the funds may have been reported as revenue that was fundraised in previous fiscal years. In 2021 we have a revenue surplus due to capital funds received for our Cancer Care expansion of \$1 million and donations for two new ambulances to replace those that were subject to excessive mileage during the pandemic totaling \$594,000. The overall 2021 surplus was \$953,433.

\*\*Dividends, interest, realized and unrealized gains and losses.



On the cover: Lakeview EMS is the primary EMS provider for an area spanning more than 350 square miles. Donations helped fund the purchase of two new ambulances, which were placed in service to meet a fall/winter surge in COVID-19 patients.



## Donor spotlight

# Answering the call, addressing the need

Mary Gillespie is an advocate and a champion for several causes in our community. She has been blessed with the resources to aid those less fortunate and feels we all have an obligation as members of this community to ensure and sustain a good quality of living in the St Croix Valley.

When Mary was invited to support Lakeview's request for the purchase of a new ambulance – she answered the call.

Her late husband (and former board member), Jim, was a "car guy," and providing a gift to help purchase a vehicle was something that Mary believes he would have enthusiastically supported. For Mary it was an easy decision – a gift from them both.

"A strong, well-maintained emergency medical service is an asset in our community and one that impacts us all. Everyone benefits," she said.

How does giving make Mary feel? "It gives me pleasure – I am happy to help," she said. "I am fortunate to live in the St. Croix Valley. There are needs in our community, and how we respond reflects on us as a community. Hopefully, each of us in our own way can do something to help maintain a good quality of life for everyone here for years to come."

With the generosity of donors like Mary, we have every confidence Lakeview will be there for those who need us most. We're grateful and blessed to have her support.

“

It gives me  
pleasure –  
I am happy  
to help.

”

-MARY GILLESPIE



## Program spotlight

### Cancer Care

The Cancer Care Fund invests in equipment, support staff and facilities that enhance cancer patients' journey. The fund provided a new social worker and supports a patient support group for Cancer Care and Breast Health Center patients. 2021 expenses were \$85,819.

### COVID-19 Response and Relief Fund

The fund purchased ambulance equipment to help COVID-19 patients during ambulance transport from their home or between hospitals. The fund also provided support to our front-line staff as they care for COVID patients in our community. 2021 expenses totaled \$20,590.

### Diabetes education

Diabetes education participation increased to 192 patients in 2021 for those with no insurance or limited coverage. This was a 126% increase over 2020. We provided \$50,573 in educational support to patients. We offered video and phone appointments and virtual classes. Our participant satisfaction survey results are among the highest percentile at 93%.

### Emergency Medical Services

Lakeview EMS is the primary EMS provider for an area spanning more than 350 square miles. Our Tactical Emergency Medicine medics deploy with the Washington County SWAT team, and now, St. Croix County, Wis. Lakeview EMS provides medical support at times for over 365,000 residents. Donations raised from the community funded the purchase of two new ambulances, which were placed in service to meet a fall/winter surge in COVID-19 patients. Lakeview EMS responded to 11,967 calls for service last year. 2021 EMS fund expenses were \$9,759.

### Greatest Needs

The Greatest Need fund supports areas of highest priority for the Hospital, including facility enhancements, medical technology upgrades, and advancing specialty excellence areas. The 2021 support included transportation, durable medical equipment and emergency clothing. In addition, the fund also supports vital health care programs that insurance does not cover. In 2021 fund expenses totaled \$21,156.

### Homecare, Hospice, Palliative Care

Lakeview's Homecare, Hospice and Palliative Care program provides convenient, cost-effective home care and hospice services to residents of the St. Croix Valley and Western Wisconsin. We serve patients' medical, emotional, spiritual and psychological needs. Forty-nine volunteers dedicated over 377 hours in 2021; 39 patients received charity care; and the program fund had expenses of \$482,976.

### Prescription Assistance Program

Last year, we provided or subsidized 802 prescriptions for 198 patients needing assistance to afford their medications – saving them more than \$35,700 in out-of-pocket prescription costs. The number of medications provided through this program increased to 802, over 522 in 2021, a 53 percent increase. Fund expenses in 2021 were \$63,722.

### St. Croix Valley Faith Community Nurse Program

This is a partnership between Lakeview Health and local congregations. Last year, the program nurses provided 767 one-on-one contacts and 677 group contacts; made 717 referrals to church and community resources; and supported clients with social isolation due to COVID-19. The program launched foot care clinics in 2021. The program had \$227,821 of expenditures.



We are grateful to Beverley for the generous gift in her estate plan to support the work of Lakeview Health Foundation's hospice.

## Planned giving

# A legacy lives on

Beverley Lloyd was an advocate, a volunteer and donor to Lakeview's Hospice program. She passed way in June 2021.

She grew up in Lakeland, Minn. and attended Stillwater High School and Coe College in Iowa. She worked for many years as an executive secretary at 3M. She was a member of the Methodist church, she sang in the choir and was an active hospice volunteer at Lakeview for many years.

Beverley's compassion and kindness made her an extraordinary hospice volunteer.

We are grateful to Beverley for the generous gift in her estate plan to support the work of Lakeview Health Foundation's hospice.

The Lakeview Health Foundation's Cedar Bend Society honors donors who have demonstrated a commitment to the future of the St. Croix Valley by including Lakeview Health Foundation in their will or estate plans. The name Cedar Bend comes from a cedar tree-lined curve along the St. Croix River – a significant marker for early settlers of the Valley. These charitable legacies help support our mission for generations to come.

People who donate to the Lakeview Health Foundation have been moved by many different life experiences. These volunteers, patients, families and providers all see the value in giving back to their community.

Donors empower us to achieve our mission and realize our vision. The work we do and the lives we touch are made possible only through the thoughtful generosity of people like our friend, Beverley Lloyd; our newest member to Lakeview Health Foundation's Cedar Bend Society.

We are grateful.

## Program spotlight

### PowerUp

In 2021, PowerUp worked hard to help kids and families have fun eating better, moving more and feeling good, with a strong commitment to health equity. Developing programs, classes and resources that are inclusive, diverse and welcoming for all kids, families and community remained a priority. Another focus in 2021 was to build upon our resources.

#### 2021 highlights

- Reached 78,000+ virtually, through classes, events, website and e-newsletters.
- Reached 41,000+ with the PowerUp Press Family Newsletters.
- Powered Up 8,000 students with the PowerUp School Challenge across 24 schools.
- Engaged 4,100 kids and family members through 20 outdoor summer events.
- Created two live virtual kids cooking classes and two cooking videos with Cooks of Crocus Hill.
- Launched two family magazines with fun activities to move more and feel good ([powerup4kids.org/familymagazine](https://powerup4kids.org/familymagazine)).

In 2022, PowerUp will continue to adapt our programs to increase access for a broader geography and diverse communities.



### Make It OK

In 2022, Make It OK celebrates 10 years of working to help end the stigma of mental illnesses.

It's been hard to digest just how much the world has changed since January 2020. Despite the many challenges, our Make It OK team, ambassadors and community partners continued to band together to mobilize this important work.

In 2021, Make It OK reached thousands through virtual and in-person events, trainings, presentations, messaging, and our network of ambassadors and community partners. We also learned a lot. Mental health rose to a top priority in the 2021 Community Health Needs Assessments, reaffirming the importance of Make It OK. Fighting stigma and creating caring communities are a key part of that priority. We continue to see progress in stigma reduction, and there is more work to do.

#### 2021 highlights

- 270+ trained as Make It OK Ambassadors through 17 virtual trainings.
- 630+ reached through 32 virtual presentations.
- 1500+ engaged in Make It OK through seven outdoor summer events.
- 1500+ walked (virtually) in the NAMI (National Alliance of Mental Illness) Minnesota Walk.
- Launched refreshed messaging and resources into trainings, website and online toolkit.

This year, we're developing new strategies and partnerships to ensure we are reducing stigma in our entire community, with a priority on reaching those most vulnerable and reluctant to seek mental health care.

Thank you for your continued support.

## Demographics

Lakeview Hospital and HealthPartners Clinic - Stillwater serve patients in the eastern Twin Cities metro area and western Wisconsin. More than 300,000 residents in our core service across Minnesota and Wisconsin have access to our services.

## Mission

Our mission: To improve health and well-being in partnership with our members, patients and community.

## 2021 foundation board

Scott Aebischer Dec-Jun 2021  
Christine Clark  
Maria Dengler  
Paul Dinzeo  
Robbie Hagelberg  
Abigail Heller

Chris Jesmer  
Lowell Johnson  
Jodi Kraemer  
Ray Marshall, Board Chair  
Joel Moline  
Ken Quickel

Aretta Rice  
Melissa Schoenherr  
Sue Sperber  
Michael Swisher June 2021

## Ex Officio:

Paul Erickson, Executive Director  
Doug Johnson, CFO  
Michelle Kraft, Finance Director  
Brandi Lunneborg, President, December 2021  
Nathan Pulscher, Interim President, June to Dec. 15, 2021  
Ted Wegleitner, President, January to June 2021

## Foundation development team

Paul Erickson, Executive Director  
Ruth Hogenson-Rutford, Development Officer  
Heather Lawton, Prospect Research Analyst  
Erika Lemke, Database Coordinator  
Pam Narum, Database Coordinator  
Heather Thorson, Communications and Events Coordinator

## Events

Annual Community Breakfast | March 31, 2022  
Summer Soiree | June 9, 2022  
Annual Gala | October 28, 2022



**Lakeview Health Foundation**

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**651-430-4556**  
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[foundation@lakeviewhealth.org](mailto:foundation@lakeviewhealth.org)