

Annual Report 2011

The  
Power of **Persistence**



UNIVERSAL HEALTH CARE  
FOUNDATION OF CONNECTICUT

# The Power of Persistence

## Dear Friends,

Connecticut Health Care Foundation of Connecticut is delighted to welcome you to our annual report. As we look at our progress over the last year, what better way to highlight our work than with the multimedia tools that allow us to connect more effectively with you – our partner?

Our success over the past year simply would not have been possible without you, and the energy of thousands of committed students and the power of their persistence. Despite a long and particularly complicated path, Connecticut's economic path forward for health care that puts people first (that means the signature red T-shirts of the Foundation's healthcareheroes) campaign sprang from the small business, large talent, advanced and health provider community coalition. They testified at legislative hearings. They rallied. They marched. And at a critical point in the year's health reform debate, they formed a human chain around the Capitol.

Our 2013 annual report takes you inside the key events of the debate, the policy decisions, at stake and the people and their actions that made a difference. You will see and feel with the people we are proud to call our partners in making the road of universal access to quality affordable health care possible. To learn more about the power of their persistence in the health reform movement, please contact our full interactive report at [www.cthealthheroes.org](http://www.cthealthheroes.org) or visit the QR code below.



President, Connecticut Health Care Foundation of Connecticut



## Our Investment Principles

We have developed investment principles that include an emphasis on social responsibility and responsible investing. Our responsibility and our investments rest with the Board of Directors and the Investment Committee.

## Philanthropic Co-Investors

The Anne E. Casey Foundation  
Connecticut Health Foundation  
The Foundation for Community Health

## Statements of Financial Position

| Assets                          | 2013<br>December 31, 2013 | 2012<br>December 31, 2012 |
|---------------------------------|---------------------------|---------------------------|
| Cash & cash equivalents         | \$477,000                 | \$677,000                 |
| Investments, at market value    | 24,807,654                | 25,222,760                |
| Property & equipment, net       | 248,264                   | 271,471                   |
| Grants receivable               | 24,800                    | 247,000                   |
| Prepaid expenses & other assets | 70,941                    | 61,247                    |
| <b>Total Assets</b>             | <b>\$27,238,627</b>       | <b>\$31,249,478</b>       |

## Liabilities & Net Assets

|   |                     |                     |
|---|---------------------|---------------------|
| Accounts payable & accrued expenses     | \$70,257            | \$207,771           |
| Grants payable                          | 248,226             | 22,440              |
| Revenue grant liabilities               | 100,677             | 241,170             |
| <b>Total Liabilities</b>                | <b>\$448,160</b>    | <b>\$471,381</b>    |
| Unrestricted net assets                 | \$26,495,111        | \$31,046,444        |
| Temporarily restricted net assets       | —                   | 73,053              |
| <b>Total Net Assets</b>                 | <b>\$26,495,111</b> | <b>\$31,722,888</b> |
| <b>Total Liabilities and Net Assets</b> | <b>\$27,238,627</b> | <b>\$31,249,478</b> |

## Statements of Activities & Changes in Net Assets

| Revenues & Gains                  | 2013<br>December 31, 2013 | 2012<br>December 31, 2012 |
|-----------------------------------|---------------------------|---------------------------|
| Net income from investments       | \$111,040                 | \$130,204                 |
| Grant revenue                     | 22,000                    | 402,000                   |
| Unrestricted donations            | 7,000                     | —                         |
| Philanthropic income              | —                         | 17,774                    |
| <b>Total Revenues &amp; Gains</b> | <b>\$139,040</b>          | <b>\$490,412</b>          |

## Operating Expenses

|                                |                     |                     |
|--------------------------------|---------------------|---------------------|
| Management & general           | \$408,208           | \$394,437           |
| Development                    | 241,241             | 251,894             |
| Health policy                  | 449,227             | 1,241,000           |
| Strategic communication        | 475,848             | 782,071             |
| Advocacy                       | 2,120,970           | 2,504,647           |
| <b>Total Expenses</b>          | <b>\$4,695,494</b>  | <b>\$4,874,049</b>  |
| Change in net assets           | 22,000,000          | 22,000,000          |
| Net Assets, Beginning of Year  | \$1,722,888         | \$1,822,888         |
| <b>Net Assets, End of Year</b> | <b>\$16,495,111</b> | <b>\$31,722,888</b> |

# Grants

The Foundation primarily funds by invitation only requesting proposals from nonprofit organizations that share our values of racial and economic justice, and advance our mission.

## General Operating Grants

These grants provide support to organizations that share the Foundation's vision and values and are active participants in the effort to achieve access to quality, affordable health care for all Connecticut residents.

|   |                  |
|---|------------------|
| U.S. Affordable Housing Grants (U.S. Department of Housing and Urban Development) | \$12,000         |
| Connecticut Council on Health Care  | \$80,000         |
| Connecticut Health Policy Project   | \$15,000         |
| National Center for Health Equity Research  | \$3,000          |
| Connecticut Department of Human Services  | 1,000            |
| Health Community Center   | \$3,000          |
| National Association of Social Workers  | \$2,500          |
| National Association of Public Health   | 1,000            |
| Working Families Organization   | 1,000            |
| Connecticut State Health Institute  | 1,000            |
| <b>Total</b>  | <b>\$132,500</b> |

## Consumer Operated & Oriented Plan Grant

This grant was given to support the development of a nonprofit CO-OP health insurance plan in Connecticut.

|                                 |          |
|---------------------------------|----------|
| CO-OP Health and Education Fund | \$10,000 |
|---------------------------------|----------|

## Organizing & Advocacy Grants

The organizing and advocacy grants inform and engage individuals and organizations about and cultivate leaders for just the movement for access to quality, affordable health care for every Connecticut resident.

|                                       |                  |
|---------------------------------------|------------------|
| National Association of Teachers      | \$1,000          |
| Wingate United Way of Wallingford     | \$25,000         |
| Wallingford Business Opportunity      | \$75,543         |
| Connecticut Parent Power              | 25,000           |
| Wallingford United Way                | 15,000           |
| National Physicians Access Foundation | \$0,000          |
| United Way of Wallingford             | 5,000            |
| United Way of Wallingford             | \$0,000          |
| United Way of Wallingford             | \$0,000          |
| <b>Total</b>                          | <b>\$140,543</b> |

## Faith Grants

These grants support organizing among faith communities and clergy to promote the moral imperative of health care reform.

|                                      |                  |
|--------------------------------------|------------------|
| Connecticut Center for a New Economy | \$20,750         |
| Christian Action Council             | 75,000           |
| United Action Connecticut            | 50,000           |
| <b>Total</b>                         | <b>\$145,750</b> |

## Small Business Grants

These grants are used to inform small business owners and employees about health care reform, and ensure their needs and perspectives are included as health care reform policy is developed and implemented.

|  |                  |
|--|------------------|
| Small Business for a Healthy Connecticut   | \$20,250         |
| Chamber of Commerce of Eastern Connecticut | 20,000           |
| Greater Meriden Chamber of Commerce        | 75,000           |
| <b>Total</b>                               | <b>\$115,250</b> |

The information contained herein is for informational purposes only and does not constitute an offer of any financial product or service.

Our  
People

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The unity of the health care reform movement from Connecticut further along the road to universal coverage for all residents. It also credited out the strength of those whose names and interest regarding the bill reflect Connecticut's people need. Our movement will need to continue to grow in size, in commitment and in power so that people's voices can be heard and people's needs are served.

Ben Livingston, Chair  
CHART

## UHCF Staff

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Executive Vice President

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Accounting Assistant

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Director of Services

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John MacArthur

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Trina Younger  
Secretary

David Livingston, J.D.

Marisa A. Evans, M.D.

David Petric

Nancy Burton, C.N.M., M.S.

Elaine Agosta, Ph.D.


 CHART

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Trina Younger  
Secretary

Howard E. Lee, J.D.

Alan Richland, Ph.D.

Sharon Palmer

Carol Knight

Marisa A. Evans, M.D.

David Petric

Nancy Burton, C.N.M., M.S.

Elaine Agosta, Ph.D.

To promote good policy

To face the opposition

To push baffling block legislation

To never forget fiction champions

To mobilize & communicate

To hope

Thank YOU

Thank YOU for your support of the LGBTQ+ community. We are grateful for your leadership in the workplace, and for your commitment to equality. We are proud to have you as a part of our team, and we look forward to continuing to work together to create a more inclusive and equitable world for all.

Executive Director of the LGBTQ+ Center

Senior Counsel

Head of HR & Talent Development

VP of Marketing & Communications

Director of Operations

Senior Manager of Finance

Senior Director of IT

Senior Director of Sales

Senior Director of Marketing

JANUARY

FEBRUARY

MARCH

Executive Director of the LGBTQ+ Center

APRIL

Senior Director of HR

Senior Director of HR

MAY

To rally & march

JUNE

SEPTEMBER

OCTOBER

To stand up for consumers & small businesses

