



## NEWS RELEASE

FOR IMMEDIATE RELEASE

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### **Blue Cross and Blue Shield of Florida Establishes Health Care Foundation**

*The Blue Foundation Will Award \$1 Million Annually in Charitable Grants to  
Organizations Promoting Better Health in Florida*

(JACKSONVILLE, FL) -- Blue Cross and Blue Shield of Florida (BCBSF) announced today it has dedicated \$5 million to establish a separate charitable foundation to promote better health in the state of Florida.

The Blue Foundation for a Healthy Florida Inc. will award up to \$1 million in grants annually to charitable organizations and programs that positively impact the health and well being of uninsured and underserved Floridians. The foundation will also support health care education, awareness and training programs; public policy research; and workforce preparation initiatives.

"BCBSF believes strongly in the value of corporate citizenship and charitable giving. Through The Blue Foundation, we will be able to reach beyond our current community programs and focus on expanding our charitable giving in the communities where we live and work," said Bruce N. Bagni, BCBSF senior vice president and general counsel. Bagni is the president of the foundation's board of directors.

The Blue Foundation for a Healthy Florida plans to operate as a 501(c)(3) organization and a separate philanthropic affiliate of BCBSF. The foundation filed its articles of incorporation with the state of Florida on March 12, 2001, and received its affiliate licensure from the Blue Cross and Blue Shield Association in June 2001.

"Our mission is designed to be broad enough to have a significant impact on the many different health care challenges in Florida," Bagni said. "The foundation will accomplish its mission through a combination of grants and support for demonstration projects, research and policy initiatives, rather than directly financing the provision of health care services."

(more)

The Blue Foundation  
Add One  
8/28/01

Susan B. Towler has been named executive director for The Blue Foundation for a Healthy Florida. Towler has been with BCBSF for five years in public relations and most recently was BCBSF's public relations director.

A seven-member board that will make the final selection of grant awards will initially govern the foundation. These board members hold leadership positions with BCBSF. The board of directors include: Bruce N. Bagni, Ed Cabrera, M.D., Tony Jenkins, Randy M. Kammer, Patrick McCabe, Deanna McDonald and Susan F. Wildes.

The Blue Foundation for a Healthy Florida will accept proposals for its first grants in August and September, with awards being announced in October. After this initial grant cycle, the foundation plans on awarding grants twice a year in April and October. The foundation grants will be in addition to BCBSF's current community relations and employee volunteer programs. "Last year, BCBSF and its employees invested more than \$3 million through charitable contributions and our employees donated thousands of hours in service to help the needy across Florida," Bagni said. "We are committed to continuing our good works and being a model corporate citizen."

For information on how to apply for a grant from The Blue Foundation for a Healthy Florida, contact the foundation office at (800) 477-3736, extension 63215.

BCBSF is Florida's leading health care company. BCBSF and its subsidiaries serve more than 5 million Floridians. Since 1944, the company has been dedicated to providing caring solutions that meet the diverse and ever-changing needs of all those it serves by offering an array of affordable health care choices. Headquartered in Jacksonville, Fla., The Blue Foundation for a Healthy Florida and its parent, Blue Cross and Blue Shield of Florida, are independent licensees of the Blue Cross and Blue Shield Association, an association of independent Blue Cross and Blue Shield companies. For more information concerning BCBSF, please visit its website at [www.bcbsfl.com](http://www.bcbsfl.com).

The Blue Foundation for a Healthy Florida is a separate, philanthropic affiliate of BCBSF incorporated in the state of Florida. The Blue Foundation's goal is to support BCBSF's corporate vision, values and promise through charitable grants for health education, research, policy initiatives and health care services.



## Improving Floridians' Lives

Grant Professionals Network  
January 8, 2003



## Goals of Presentation

- Gain common understanding of The Blue Foundation's purpose
- Build awareness and understanding of the foundation's strategies and grantmaking process



## Background

- BCBSF – A long history of helping and caring
- Corporate responsibility to provide resources, time and talent to communities
- In 2002, the Enterprise and our employees invested more than \$15 million; our employees volunteered 11,000 hours



## Background

- The Blue Foundation created in 2001 as a private, philanthropic foundation
- Operates outside of BCBSF as a separate, non-profit corporation
- BCBSF is the sole member of the corporation
- Separate foundation board from BCBSF board of directors



## Purpose of The Blue Foundation

- Primary purpose is to fund and support 501(c) (3) programs and organizations that positively impact the health and well being of uninsured and underserved (e.g., rural, at-risk, low income) Floridians
- Enhance access to quality health-related services for Floridians, particularly the uninsured and underserved
- Accomplished through a combination of grants and support for demonstration projects, research and policy initiatives, rather than directly financing the provision of health care services (reimbursement of care)



## Types of Programs Eligible for Funding

- Requesting organization must have tax-exempt status as a 501(c) (3) organization with the Internal Revenue Service
- Health care education, awareness and training programs
- Philanthropic, proactive approaches to address present and future health care issues
- Community Health Clinics
- New ways to deliver health care or increase health care access to uninsured and underserved
- Programs that are innovative or collaborative

### **Groups/Programs NOT Eligible for Funding**

- Individuals
  - BCBSF members who are denied coverage
- Fundraising events or celebrations
  - Tickets to galas, dinners, luncheons
  - Tickets to arts and culture activities, museums
  - Sponsorship of galas, fundraisers, golf or athletic tournaments
- Political or lobbying organizations
- Fraternal, athletic or social organizations
- Religious organizations for religious purposes
- Organizations that do not directly serve Floridians

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### **Grant Guidelines**

- Each year, foundation plans to award up to \$1 million in charitable grants (2002: \$1.28 million)
- Requests will generally be considered for grants of all sizes from \$10,000 up to \$100,000
- Multi-year commitments may be made, depending upon the request, the need and the funds available
- Three grant cycles since inception (every six months)
- One proposal submission per calendar year
- Third grant cycle: 215 proposals totaling \$14 million; made 17 grants for \$785,962

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### **Grants Made to Date**

- Forty-four non-profit organizations totaling \$2.2 million in grants
- Diverse organizations located across the state
- Prescription drug education, youth development, at-risk teens, diabetes, women's heart disease, nurse training, prenatal care, asthma, physician training
- Primary focus in future will be on community health clinics

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### **New Strategic Plan -- Mission**

- Enhance access to quality health-related services for Floridians, particularly the uninsured and underserved
- Partner with community leaders to recognize and support strategies that advance health and well-being
- Strategically focus grants toward philanthropic, community-based solutions; improve program capacity; reduce barriers to access
- Nurture community health leadership to reinforce local solutions, foster innovation, sustain quality; leverage resources to maximize measurable impact

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### **Guiding Principles and Priorities**

- Both for The Blue Foundation and Proposals/Grantees
- Improved Access, Focus, Impact
- Diversity, Relationships, Planning
- Leadership/Accountability, Learning, Creativity

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### **Proposal Evaluation Criteria**

- Fit with Foundation Mission, Guidelines and Priorities
- Quality of Leadership
- Financial Strength of Institution
- Organizational Diversity
- Quality of Planning
- Potential Favorable Impact of Grant
- Compelling Rationale or Situation

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### **Proposal Review Process**

- Request for Proposals developed and mailed to database; publicize RFP through news release and website ([www.bluefoundationfl.org](http://www.bluefoundationfl.org))
- Staff records all proposals received, assigns a tracking number and sends acknowledgment letter to organization
- Foundation provides one copy of each proposal to independent readers for initial screening; independent readers verify basic criteria (501c3, Floridians served, etc.)
- Independent readers review proposals against established criteria and provide recommendations within funding limits

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### **Proposal Review Process**

- Employee Review Team members break into teams and assigned proposals for review
- Two-day meeting to review proposal finalists and provide final grant recommendations to Board Grant Committee
- Board Grant Committee approves, then goes to Board for final approval
- Staff prepares award letter and grant contract for each organization selected; organization signs and returns contract

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### **Proposal Review Process**

- Check presentations and events scheduled for each grant award recipient; sometimes surprise events are held
- Staff and Employee Review Team monitor grantee's progress and evaluate success of program every six months; results used to improve future grant cycles and criteria
- Process is more art than science; more subjective than objective
- Proposals are not scored with points; don't share feedback on why proposal is not selected

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### **Long-Term Goals for The Blue Foundation**

- Fundraising to increase the endowment
- Implement own initiatives and programs, including annual community prize
- Appoint community representatives to board of directors
- Focus on community health clinics

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### **What You Can Do**

- Become involved in your community
- Promote philanthropy and volunteerism
- "Live your life so that you can say each evening that you have in some small way contributed to the good of mankind."

-- Life's Little Instruction Calendar  
Volume VI

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### **For More Information**

Website: [www.bluefoundationfl.org](http://www.bluefoundationfl.org)

1-800-477-3736, x63215

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