

2017 ANNUAL REPORT





CHAMPIONS OF WELL-BEING EVERYWHERE

March 2018

This is a promising moment for our nation, as the importance of mental health and well-being become obvious to growing numbers of Americans and awareness of mental health disorders, addiction and related conditions are emerging from the shadows and moving onto the front page.

For a long time, diseases of despair—depression, anxiety, addiction, thoughts of suicide—have been stigmatized as character flaws or moral failures, and even today are widely viewed as a personal matter, something to be covered up, kept out of sight, never talked about. The responsibility for caring and healing still largely falls on the individuals involved and their friends and family.

But this is changing. Conversations about mental health and substance misuse and the search for solutions are now happening everywhere, across age groups, sectors and political lines.

This, in turn, is **fostering a new awareness** that the answers to mental health and well-being are found not only in clinics and public agencies but also at school, at work and in communities. There is a realization that we need policies that build neighborhoods that have a sense of hope, meaningful opportunity and paths out of poverty. This shift in thinking is arising at just the right time.

As American people, we are not all faring well. While the most fortunate among





us are experiencing healthier, longer lives, many of us—especially the most vulnerable—will live sicker, shorter lives than our parents. A century-long trend of increasing lifespans is reversing.

Over 1 million Americans have died unnecessarily in the last 10 years from alcohol, drugs and suicide. This is the equivalent of nine school buses going over a cliff...every...single...day. Current projections for these “deaths of despair” point to increases of 80 – 100 percent in the coming decade. That means another two million lives lost. Parents and children gone. Families suffering. Businesses, schools and communities torn apart.

These aren't just statistics. These are our friends, family members, co-workers and neighbors.

It's a national crisis that poses a grave threat to our country. But we have solutions. We know there is no surer path to stronger communities, a thriving economy and robust homeland security than overturning the decline in well-being among the American people.

I am hopeful. We are seeing signs of progress every day—people turning to one another for support, and communities working to remove the barriers that divide. We are witnessing innovative solutions that stem the suffering, increase access to integrated care, and improve the community conditions that give rise to intergenerational well-being and resilience. Advancing this work, and being a catalyst to significantly amplify these efforts, is the focus of Well Being Trust!

With a bold mission, a growing set of partners, a newly formed staff and advisory team of national leaders, and an initial

OUR APPROACH

An “ecosystem” approach that stimulates change in organizational practices, public policy and private sector investments is at the heart of Well Being Trust’s aspiration to build a culture of well-being while delivering on our mission to advance the mental, social and spiritual health of the nation. For us, this means:

- Embracing the whole person, the whole family and the whole community
- Placing a primary focus on vulnerable people and populations
- Increasing access to care and to the social, economic and environmental determinants of well-being
- Making it safe and normal to talk about anxiety, depression, substance use and thoughts of suicide—just as we might talk about any other physical ailment
- Ensuring that everyone is able to get help when needed
- Building the capacity of peers, social support networks and community collaboratives to drive positive change
- Identifying and spreading implementation of evidence-based practices, policies and investments that improve care and drive community outcomes



endowment, **Well Being Trust is helping galvanize** the evidence base, the shared understanding, the tools and the community will that is essential for measurably advancing our nation’s health and well-being.

Blessed by the vision of our first investor-partner, Providence St. Joseph Health, and rooted in the social justice mission lived by its foundresses for over 160 years, Well Being Trust is an open platform for health systems and partners across sectors to drive transformative change.

Delivering on our mission will take all of us working across sectors, politics, geographies, generations and walks of life.

We hope you are inspired by what you read and feel called to deepen your exploration of what you can do where you live, learn, work, play and pray to create a society where EVERYONE has the opportunity to reach their fullest potential for well-being.

In spirited partnership,

A handwritten signature in blue ink, appearing to read "Tyler Norris".

Tyler Norris, MDiv
CEO, Well Being Trust

AT THE CROSSROADS OF CRISIS AND OPPORTUNITY —A PATH FORWARD

The United States is experiencing a mental health and well-being crisis.

Rates of anxiety, depression, suicide, addiction and substance misuse are at all-time highs.

Neuropsychiatric disorders

are now the leading cause of disability in the United States, accounting for 18.7 percent of all years of life lost to disability and premature mortality.¹

Related economic, sociocultural and environmental conditions in our communities are robbing many of their dreams and shortening lives. Adverse experiences and toxic stress are becoming ever more pervasive. The human suffering is enormous.

The U.S. now spends over \$400 billion annually on mental health, including of the cost of care and the loss of productivity to our economy and society, making it the costliest preventable medical condition in the country—costlier than diabetes, respiratory disorders and cancer combined.² Yet, despite this spending, many

people struggling with mental health and addiction do not get the help they need. In truth, our nation is failing the very people who need help the most.

In 2016, more than 44 million Americans experienced a mental health issue, and 19 million experienced a substance use disorder—with 8 million experiencing both.³ Over the last 10 years, more than 1 million lives were lost to drugs, alcohol or suicide. Each of these numbers has a name, each name belongs to a family and each family is part of their community. These “deaths of despair” could double over the next decade—if we do nothing.⁴

While many organizations and individuals across the nation are working to address this crisis, most efforts have been disjointed and largely focused on treating symptoms or illnesses as single occurrences rather than as a complex set of factors that determine a person’s well-being across a lifetime. **All physical, social and spiritual factors must be addressed simultaneously** and in a coordinated fashion in order to promote deep

OUR MISSION

To advance the mental, social and spiritual health of the nation.

OUR VISION

Human flourishing across the lifespan, in healthy, equitable communities that create opportunity for everyone to realize their fullest potential.



OUR VALUES

Loving-Kindness
and Compassion

Dignity and
Respect

Radical Inclusion
and Equity of
Opportunity

Social Justice
for All

healing and create a culture of well-being in our nation—ensuring that every person in every community has the conditions and support needed to be well.

With shifting care models, a growing desire for reform, a strong evidence base of what works, and recent national initiatives to address mental health and substance misuse, there is a national moment of opportunity. Together with our partners, we are poised to increase access to integrated whole-person care, invest in the upstream determinants of well-being, and shift the national conversation and action from doing good things to being accountable for outcomes. Together, we must **drive the transformative changes** at the scale needed to ensure a national culture of well-being.

Well Being Trust began operations in Oakland, California, in January 2017 as an independent 501(c)(3) public charity. With an initial endowment of \$130 million, we are dedicated to creating innovative solutions for well-being that significantly reduce the personal, familial, social and economic costs of mental illness, substance misuse and related ills, while increasing human flourishing.

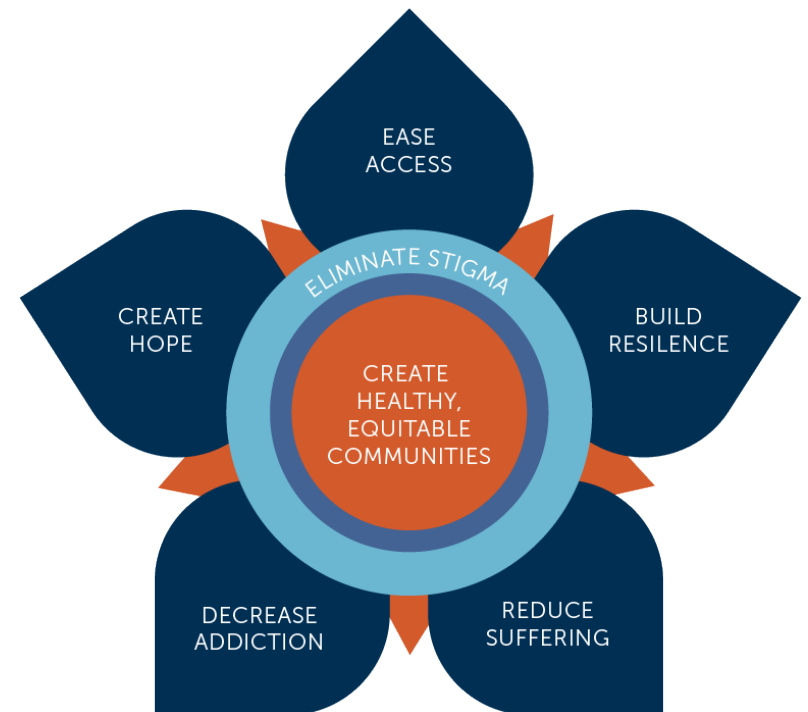
Our Approach

We are engaging health systems, philanthropies, businesses and organizations across all sectors and perspectives, and community residents, to work together to increase access to integrated whole-person care, advance public policy and investments, and apply evidence-based strategies to address the underlying drivers of disease and its human and financial costs—with a priority focus on those who are most vulnerable.

Our Goals

Working in partnership, we invest for impact in six focus areas:

- Easing access to care and to the determinants of well-being
- Building resilience in children, teens and families
- Reducing suffering from depression, anxiety and social isolation
- Decreasing addiction and substance use while promoting recovery
- Creating hope for people and families living with serious mental illness
- Eliminate stigma everywhere, and grow a culture of well-being in healthy, equitable, resilient communities





Our Method

To achieve our goals, Well Being Trust has created a comprehensive ecosystem approach that allows us to go all in for impact. All our investments within this ecosystem can be viewed as interconnected programs, or “levers,” that connect, build upon and amplify each other.

Our Five Levers

- Clinical transformation
- Community transformation
- Policy and advocacy
- Social engagement
- Measurement and data systems

Just as there are multiple causes behind what is ailing us, so must any effective solution be multifaceted. There is no magic pill, app, nor program, nor policy change alone that can simply “solve all the problems.” Lasting, effective solutions require meaningful partnerships of determined leaders and organizations, combined with changes to organizational practices and public policies, and investments that address challenges in a systemic, whole and comprehensive way.

Thus, these five levers are not discrete areas of activity. Rather, they are mutually beneficial and reinforce actions that, when applied together—and when structured to deliver adequate reach, intensity and duration—result in a “dose-sufficient” action capable of delivering a population-level impact. Anything else is tinkering. This scale of impact can ensure that every person in every community has access to care and to the conditions and support for well-being.

OUR GUIDING PRINCIPLES

Embrace a whole-person, whole-community, whole-systems view.

Cultivate a boundary-crossing, distributed force of leaders across a “field of fields,” creating healthy communities that are gardens to grow people in.⁵

Do what we do best; partner for the rest.



YEAR ONE HIGHLIGHTS

In our first year, Well Being Trust invested over \$15.5 million in 36 initiatives and created over three dozen new partnerships addressing clinical and community transformation, policy and advocacy, social engagement, and measurement and data systems. Following are a few examples.

INNOVATIVE STRATEGIES

We supported the Institute for Healthcare Improvement in creating a learning collaborative of nine leading health systems to pursue innovative strategies to address the needs of individuals with mental health and substance misuse issues seeking care in emergency departments. This clinical transformation initiative also goes “upstream” to tackle the underlying reasons patients are unable to access the care they need in the community long before they arrive in an emergency department.

PAIN IN THE NATION

THE CRISIS

Visit PainInTheNation.org

“THESE NUMBERS ARE STAGGERING, TRAGIC — AND PREVENTABLE.”

— John Auerbach, president and CEO of TFAH

More than 1 million people have died from drugs, alcohol and suicide over the past decade. If these trends continue, the death rate could grow to claim 1.6 million more lives by 2025.



PAIN IN THE NATION REPORT

With the Robert Wood Johnson Foundation and Trust for America's Health, we co-funded and released the seminal 2017 report *Pain in the Nation* on “deaths of despair” in America. The report presented 60 evidence-based policy and advocacy strategies to help decrease deaths due to alcohol, drugs and suicide and called for a national resilience strategy.



THOUGHT LEADERSHIP

We designed and funded a series of innovation sessions with thought leaders from around the nation to create a well-being measurement and data system strategy for health systems and community partners. This initiative is finding ways to better integrate clinical data, utilization and cost data, community needs and assets data, and patient self-report data. Further, with the National Committee on Vital Health Statistics and others, we are helping advance a comprehensive set of vital condition metrics for well-being in the nation.

WELL BEING LEGACY

We seed invested in a nationwide community transformation initiative, currently called Well Being Legacy, which actively engages leaders and innovators from local communities and brings them together to coalesce and lift up a comprehensive practice, policy and investment strategy to advance intergenerational well-being across the nation.



COMMUNITY EVENTS

Well Being Trust's team took our active listening and message to groups around the country—to hear, to engage and, together, to inspire national and community leaders working at the front lines of health, well-being and social justice. We made keynote presentations and/or moderated dialogues on mental health and well-being at over 50 national and community events.

YOUTH CAMPAIGN

We partnered with iHeartMedia, BuzzFeed and Complex to launch the #BeWell, #BeHeard, #BeThere tween / teen campaign to remove stigma and activate youth to support each other's well-being. This campaign also gives parents and families tools to start conversations and find common ground. We have already generated over 5 million social media and community interactions. This social engagement campaign launched in August 2017 during back-to-school week in the Los Angeles Unified School District and was later spread to Portland and Spokane after a tragic school shooting. Together, the initiatives have generated over 90 million impressions in six months, with notable support from national personas such as Ryan Seacrest, Abby Wambach, Brandon Marshall and Azealia Banks.



ENGAGED PHILANTHROPY

Through our practice of engaged philanthropy, we are working closely with scores of organizational and community partners to better understand challenges, surface assets, shape strategy, drive aligned action and assess results. These efforts are designed to allow us to constantly learn, innovate and increase positive impact on mental health and well-being outcomes over time.



CLINICAL TRANSFORMATION

Caring for the whole person—spirit, mind and body—shifts the question from “What’s the matter with you?” to “What matters to you?”⁶

Health care, as experienced today, is fragmented and exists in silos. In most settings, despite a strong evidence base for integrated care, mental health is wholly separate and distinct from care for physical health. This structure fails to address whole-person health, undercuts prevention, limits treatment effectiveness, impedes access and increases the costs that drive unaffordability.

Many of us who have sought care know the difficulty and frustration encountered when seeking mental health or addiction services. In one recent survey, half of the respondents reported that they did not know how to access quality affordable mental health services for themselves or a loved one.⁷

So, it comes as no surprise that only one in 10 individuals with substance misuse or addiction concerns actually receive necessary care, and only four of every nine adults with any type of mental health need receive care.⁸

Increasing access to integrated care is at the heart of our mission and requires increased clinical focus, operations and access paired with new financing models. To improve access and outcomes and enhance what our communities and country offer for mental health, we must bring mental health and substance use services to the places that people most often present with needs and change the bifurcated funding systems and policies that perpetuate care in silos.



Well Being Trust started its clinical transformation work inside our initial partner-investor, Providence St. Joseph Health. In 2017, we worked with system leaders to establish a Clinical Performance Group—a multiyear learning collaborative that addresses three of the most pressing and cost-driving challenges within the health system:

- **Integrating behavioral health into primary care**
- **Transforming substance use treatment and services**
- **Finding better ways to care for people with mental health issues in the emergency department.**

The majority of behavioral health issues are addressed by primary care providers, but without proper support systems, the care provided is often suboptimal. Primary care providers typically lack the training, resources and time to adequately care for individuals with behavioral health and addiction issues. Inadequately treated and undiagnosed behavioral health issues have a profound effect on the ability to successfully treat other chronic conditions, affecting patients' motivation, understanding and engagement with the totality of their health—and dramatically increasing the total cost of their care.

Pain in the Nation calls us to action, especially with regard to how we treat those suffering with addiction and substance use disorders. Treatment services are often underfunded, leaving those in need of care waiting days or weeks just to begin the first stages of their journey to recovery. New therapies, including medications for opioid use disorder, offer hope, but without targeted peer supports they are difficult to implement. As the opioid crisis intensifies, many individuals have also lost their jobs, families and even housing, leading to deaths of despair across the

country. Creating new pathways for care, including standardized screening tools, developing clinical pathways for withdrawal and maintenance management, and building resource networks within communities are key to responding to the call.

In the United States, the emergency department remains the first point of entry for many individuals who have mental health care needs. One study found that one in eight visits to emergency departments are for mental health



and substance use.⁹ Through our investment and partnership with the Institute for Healthcare Improvement, **we are working to understand the opportunities to remove barriers and accelerate the convergence of mental, physical and social health considerations in the emergency department.**¹⁰ The goal is to begin to support the health and well-being of more people in the places they most often seek care for mental health needs, and then go “upstream” and find ways we can prevent those individuals from showing up in the emergency department in the first place. **Nine leading health systems are participating in the initiative, including Adventist Health, Allina Health, Ascension, Kaiser Permanente, Maine Health, Memorial Hermann, Northwell Health, Orlando Health and Providence St. Joseph Health.** This work will result in field-tested comprehensive change packages that provide road maps to scale and spread solutions.

COMMUNITY TRANSFORMATION

All health is local. To advance the mental, social and spiritual health of the nation, we start with a recognition that clinical transformation and access to care are vital but are only a small part of the equation. To truly advance well-being, we must begin by recognizing the unique gifts, assets, contributions and needs of an individual community. For the health care sector, bridging this gap requires new eyes and an intentional shift to see health as moving beyond the walls of the clinic to starting within our homes, schools, workplaces and neighborhoods. Essential to this: placing a central focus on vulnerable people, families and communities to achieve health equity.

Beyond seeing opportunities and needs, we engage communities in advancing the changes that foster well-being. We are dedicated to supporting people and communities in direct action and to helping drive change that builds a culture of well-being and creates the capacity for personal well-being, ultimately shifting community expectations and building public will for action.

Well Being Trust's team brings decades of community experience and partner relationships across a wide spectrum of issue areas, sectors, geographies, generations and perspectives. We are tapping into this experience and the expertise and wisdom of our partners to galvanize the will to strategize, activate and sustain a dynamic movement for well-being in the nation.



SPIRITUALITY AND HEALTH FUNDERS COLLABORATION

Well Being Trust partnered with the Templeton, Fetzer, George, Nathan Cummings and other national foundations to bring diverse funders together at the intersection of faith and health, to learn from each other and build a partnership strategy for co-investing and field building at the intersection of faith and well-being.



COORDINATING CLINICAL SERVICES WITH A HOMELESS PROGRAM

Well Being Trust is helping expand implementation of the Napa County Whole Person Care initiative, which focuses on coordination of health, behavioral health and social services in a patient-centered manner for improved health and well-being through more efficient and effective use of resources.



WELL-BEING LEGACY

In March 2017, Tyler Norris led the opening plenary call for a nationwide “healthy community agenda” at the Association for Community Health Improvement annual meeting. That day, and in the months that followed in meetings with business, governmental, nonprofit, faith and community sectors, we have found broad-based support to mobilize a locally rooted community health agenda as a national force for change. A broad-based collaboration has begun to form around our call to action, cultivated with early seed funding in May. Now called Well-Being Legacy, dozens of organizations and communities are beginning to advance an inclusive multiyear initiative to coalesce a transpartisan investment and policy strategy for assuring the conditions for intergenerational well-being in the nation.

EMOTIONAL WELL BEING SUMMIT

In January 2017, on his first day as Well Being Trust’s CEO, Tyler Norris presented at the “Emotional Well Being Summit” in Washington, D.C., which included over 100 leaders from across the nation, hosted by the Veterans Administration and 19th surgeon general, Vivek Murthy, MD. Since then, Well Being Trust has been incubating a new social venture that is advancing Dr. Murthy’s vision. With our support, his formative entity is building out the science base and growing the public/influencer discourse on what increases and what depletes personal, family and community well-being. Dr. Murthy now serves as our first senior fellow, helping guide our Advisory Council.



PARTNERSHIP WITH NONPROFIT FINANCE FUND AND PREVENTION INSTITUTE

Well Being Trust is committed to bringing together diverse stakeholders to advance community-driven solutions relating to key issues such as homelessness and trauma. Through our partnership with the Nonprofit Finance Fund, we are engaging leaders in a cross-sector dialogue about strategies and innovations to unlock private capital for housing developments with supportive services and address solutions for high-needs individuals experiencing homelessness in Los Angeles County. Similarly, we are working with Prevention Institute to build the capacity of California communities experiencing trauma to identify resources and promote healing through the advancement of their Adverse Community Experience and Resilience (ACE|R) framework.

THE THEORY OF ACTION FOR WELL BEING TRUST'S POLICY WORK REVOLVES AROUND THREE CORE PRINCIPLES

1. Identifying the policy barriers that prevent people, communities, states and the country from achieving optimal health and wellness
2. Assessing the best solutions for solving the problems
3. Applying these solutions, at the right time, to help bring about change.

POLICY AND ADVOCACY

Policy remains one of the most significant factors that limits the rate of change in scaling clinical and community transformation. But, at the same time, focused policy work has the potential to increase the rate and effectiveness of change at federal, state and local levels. Further, policy can be leveraged to influence public funding systems to change conditions, incent or require additional adjustments in practices and behaviors in alignment with the evidence, and ultimately support clinical and community innovations.

Policy is movement in a direction for a reason.¹¹ We believe that to fundamentally improve the health of the nation, we need to move together in a new direction—one that does not prioritize sickness but promotes health and does not weigh one facet of health over another but recognizes that health is whole and not structured in arbitrary categories like 'mental' and 'physical.' Our understanding of policy and the current way most policy is advanced in silos requires us to think about how we can help policymakers and influencers address issues in a more

systematic way. To this end, we are actively working to bring in strategic partners to create a policy ecosystem that can accomplish our goals in alignment with our overall mission.



NATIONAL MEDIA ATTENTION

Through partnership with Trust for America's Health, the national introduction and dissemination of the *Pain in the Nation* report was covered in more than 100 national and state publications and news outlets, including National

Public Radio, *The Washington Post*, Reuters and *The New York Times*, and reached more than 3 million people—helping advance Well Being Trust's calls to action and supporting data among advocates, allies and policymakers nationwide. The report will continue to be a source of continued learning in Well Being Trust's 2018 policy engagement program.

In our first year, we have taken specific steps in policy and advocacy through increasing outreach and awareness of who we are and what role we will play in policy, partnering with strategic organizations and leaders, and deciding what we want this policy ecosystem to do to advance our goals relating to mental health.





PAIN IN THE NATION

In November 2017, we partnered with the Robert Wood Johnson Foundation to co-fund a report with **Trust for America's Health** called *Pain in the Nation*. In this report we highlighted the number of deaths due to drugs, alcohol and suicide over the last decade; projected forward how many more lives we will lose if we do nothing; recommended 60 evidence-based programs and policies that can drive impact; and called for a national resilience strategy. This powerful report has become a platform for policy investments and is already shaping dialogues around the nation and generating an array of blog posts, articles and media interviews.



UNITED STATES OF CARE

As a **founding partner of the United States of Care (USofC)**, Well Being Trust leadership will become a member of the USofC team—serving as the mental health and well-being policy partner. We will work to ensure that mental health elements are infused seamlessly into the USofC's work and leverage the work on the state level to help develop state-specific strategies for advancing effective mental health and well-being policies.

BIPARTISAN POLICY CENTER

We launched a partnership with **Bipartisan Policy Center** to engage and leverage key leaders from both sides of the political aisle to raise awareness, increase stakeholder engagement, and enhance the focus on identifying solutions specific to mental health, substance use disorders and well-being.

HEALTH AFFAIRS BLOG

During fall 2017, we published a piece in the influential Health Affairs blog¹² to call out the need for foundations, health policy leaders and other key stakeholders to take an integrated approach to advance mental health. In addition, we published other highly visible blog posts and op-eds to help spark important conversations and raise critical questions in the minds of this country's public policy leadership regarding mental health and wellness. We are intentionally investing in providing substantive information and building our credibility as a "go-to voice" for mental health and well-being policy.





“Let’s talk about you for a minute. How are you feeling? Hopefully, you’re doing OK, but if you’re anxious or sad, I totally get it. You’re not alone. Share how you’re feeling with us on social media using #BeWell or #BeHeard. We care, so tell us how you’re doing.”

—Nina Chantele, radio personality



SOCIAL ENGAGEMENT

Successfully advancing a culture of well-being in the nation requires the meaningful engagement and activation of people.

Each of us is the front line of neighborly compassion and loving kindness that makes the difference in support and resiliency. It is we the people who, as community members, are the heart of our democracy. Effective engagement in community and civic life is a prerequisite for healthy communities and a vibrant nation. Together it is our voices and hands that shape change. We are meeting people where they are—at home, at school, at work, in the coffee shop, in the car or on the bus—to build a distributed force of community leaders.

Our working premise: You are not alone!

A challenge we embraced in year one was to amplify the existing social movement focused on removing the stigma of mental illness and help it grow with diverse voices and life experiences. To amplify a social movement means joining people where they live, work and commune. It means meeting them where they are and engaging with them on their terms. One of those places is on social media.

We use social media for every part of our lives—in our personal relationships, for entertainment, at work and in our studies. To put it into context, every minute, people around the world collectively send more than 35 million messages through Facebook and Instagram and post 500,000 tweets. Social media doesn't just impact our lives from an entertainment and networking perspective; it helps us tackle some of the world's biggest challenges. From human rights violations to climate change, and now building awareness for mental health and wellness and removing stigma, social media is a powerful vehicle for movements that change attitudes and behavior.

Connecting all our work creates the opportunity to both share and engage through social outlets. Our strategy in this space is to engage people within the social platforms they are currently using to start a conversation about mental health, with the aim to normalize it, encourage wellness and resilience, and fight stigma. Through the use of helpful information, storytelling and user-generated content, we have begun a strong foundation for the **#BeWell, #BeHeard, #BeThere movement.**

Empowering Youth through Teen Peer Hotlines

We have identified an innovative, powerful and multifaceted asset in the youth-staffed peer support hotlines around the nation. These hotlines train teens, many of whom have lived experience with challenging circumstances, to serve as peer counselors to other teens who access them via phone, text, chat and/or email. These organizations generate value in at least three distinct streams:

- 1) Supportive contact, resources and crisis intervention for callers/texters
- 2) Deep training, mentorship and preprofessional development for peer counselors
- 3) Exposure to activated, informed, and skilled peers for all youth in the schools and communities of these programs, each of which provides extensive formal and informal outreach and education

The impact these innovative and multifaceted programs currently have is limited by their status and functioning as separate and unrelated organizations, each working to manage their services, training/recruitment, outreach, communications/marketing, crisis protocols, technological infrastructure and resource development. They do this without the support of a unifying organization, defined field of practice or core primary funding source. We are working to convene the existing lines; strengthen and build their capacity; and pave the way for the expansion, scaling and national networking of their innovative programming. By seed funding this growing consortium and its activity, our vision is that youth across the nation have access to trained and supported youth in times of distress or crisis, and that every teen has the opportunity to be a support to others.

Well Being Trust's social engagement efforts support the core elements of our approach to population-level impact by generating awareness, a sense of connection and action among influencers, stakeholders and communities. Our discovery in this arena identified teen (age 13 – 19) and tween (age 9 – 12) emotional well-being as the primary focus area. As research on the prevalence of mental and emotional distress, bullying, and suicides among youth continues to proliferate, our outreach and engagement work has focused on normalizing the conversation about mental health among these key Generation Y and Z demographic groups.

Well Being Trust has formed relationships with iHeartMedia, Complex, BuzzFeed, OZY Media, Dash Radio and other media partners and a growing host of prominent social influencers to begin a movement to #BeWell.

Since the campaign launch in August 2017, we have helped spark over 90 million impressions, including 80,000 uses of the hashtags #BeWell and #BeHeard, activating youth to stand up for mental health and well-being. We've encouraged youth and families to share their stories of struggle, survival and perseverance. We provide platforms for

teens to share their successes and encourage others to #BeWell and #BeHeard. Through on-air, digital and social promotions as well as live event activation at high schools and community gatherings, this effort is successfully starting important conversations, reducing stigma and engaging youth as champions.

Key benefits from our investment in engagement and social media include the following:

- 1) Raising awareness and understanding of mental health and well-being and of Well Being Trust as a resource and trusted voice
- 2) Building engagement that results in people having conversations, speaking out, taking action, attending events and starting community groups
- 3) Engaging potential partners by creating visibility for the cause and the campaign that raises the awareness and interest of other organizations to partner in this work and to increase overall impact
- 4) Building a community that can advocate for change, including change in the culture in schools and changes in local, state and federal policies; the ability to connect community members to action is critical to the success of the movement



VIDEO AND BLOG SERIES

The new partnership with Complex led to the creation of a video series and written blog series with musicians, athletes and celebrities highlighting the importance of talking about mental health and wellness in our lives and sharing their real-life stories of addiction, depression, and other personal struggles and healing to show that you can overcome these issues.



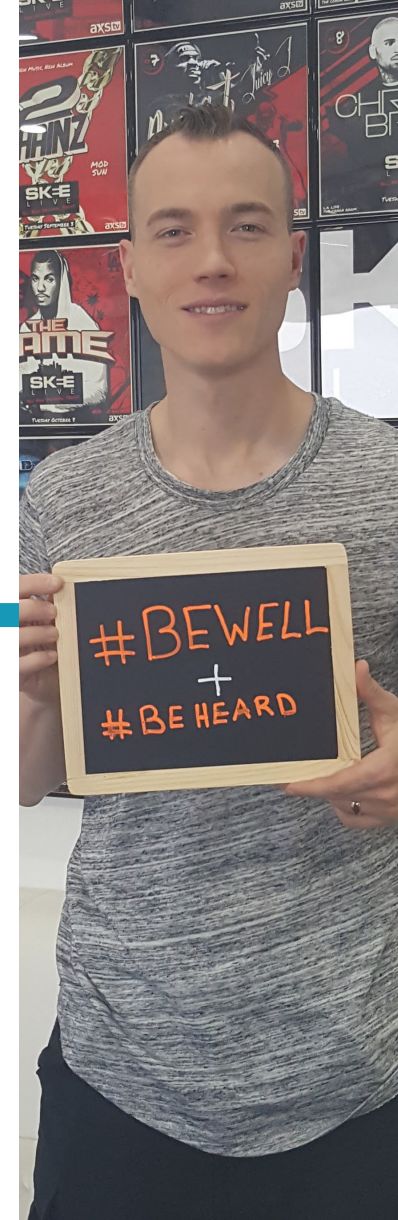
MEDIA PARTNERSHIP

Our iHeartMedia partnership launched a national campaign to boost awareness of mental health and well-being among the teen/tween market. The campaign included on-air personalities discussing mental health and wellness, live event integrations to promote the #BeWell movement and a series of high school events focused on embracing the positivity of acknowledging your well-being.



DIGITAL STORYTELLING

With BuzzFeed, we orchestrated a two-week "takeover" for mental health awareness, where content focused on mental health and wellness activities was pushed out via web and social channels. We featured clinical experts from Well Being Trust as well as social influencers and real-life stories to provide a comprehensive overview of the many facets of mental health and wellness.



MEASUREMENT AND DATA SYSTEMS

In order to improve mental health and well-being, we need to understand the underlying causes and conditions of suffering. Data and technology help us do this in a rigorous, defensible and repeatable way, supporting all our program and investment activities and contributing valuable information and resources to the field.

We recognize that measurement and data systems are only relevant if they help inform action and improve results. Our approach to data and technology is to focus first on sharpening our theory of change, outcomes and goals and then develop a measurement strategy that ensures that we understand how data and technology can best inform actions.

In the coming year, we expect to increase our investment in measurement and data systems that can clearly improve effectiveness in three areas:

- 1) Assessing the current state of mental health and well-being, and specifically providing us with unique insights into places and populations that are facing significant issues and barriers
- 2) Measuring the progress of our investments toward achieving our larger vision and specific improvements in the five focus areas
- 3) Communicating what we've learned and accomplished to the wider clinical and nonprofit community to help rally others to the cause

The specific investments we plan to make should be aimed at supporting the larger public good. We've identified the following guiding principles we will use to inform the direction and outcomes of our data and technology projects:

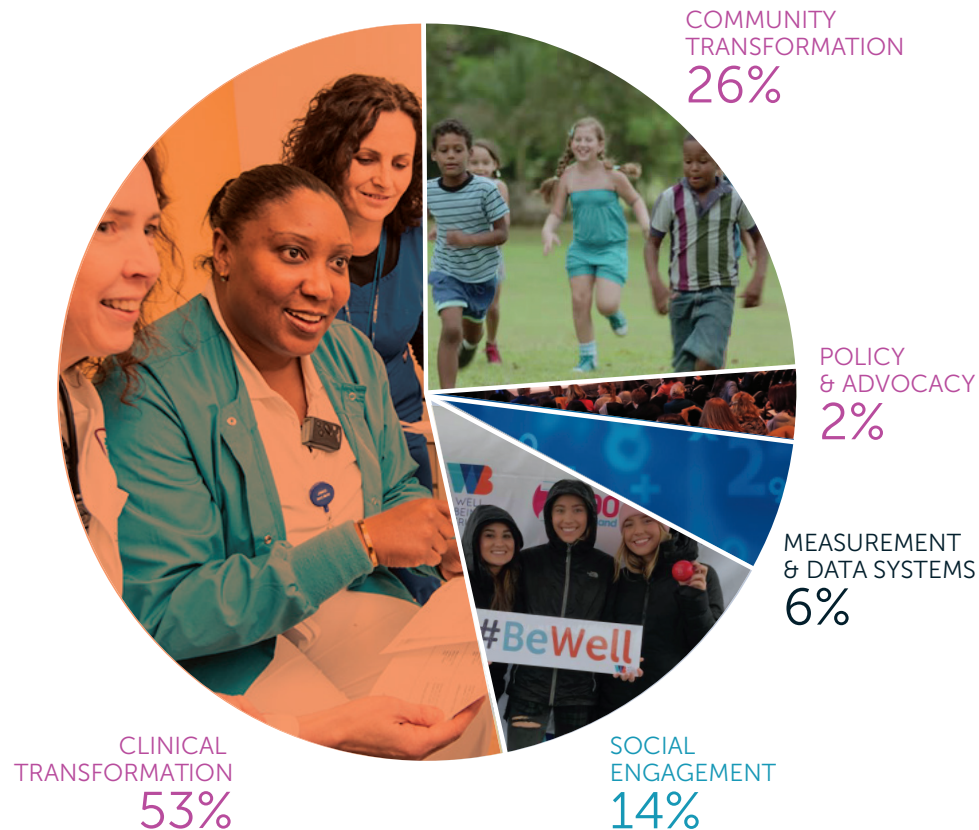
- Use and contribute to open-source projects: As a foundation, our core mission is to contribute to the public good. As we build technology, we want to actively support the open-source culture by using and contributing our code where practical.
- Rely on open data standards: We have the unique opportunity to inform the national conversation about measuring mental health and well-being, but unless we make our data open and easily accessible, we won't succeed in changing the larger conversation about mental health.
- Iterate and rapidly improve: To spend our resources wisely, we will focus our process using an "agile" development methodology that ensures that we can achieve maximum results with minimum investment.

In order for our data and measurement strategy to be effective in the long term, we need to find partners who can assist us with building, maintaining and scaling our solutions to a wider audience. Over the last year, we have begun building key partnerships with thought leaders in the field, such as the Institute for People, Place and Possibility; Community Commons; ReThink Health; and many others who will be key to expanding our reach and sharing what we learn with a wider audience.

INVESTING IN AN "ECOSYSTEM FOR IMPACT"

Our balanced portfolio of initiatives, grants, contracts and investments has been carefully designed and refined to deliver on our "all in for impact" strategy, creating the conditions within a new ecosystem of whole-person health to make change happen at local, state and national levels.

In our first year, Well Being Trust's **\$15.5 million investments in 36 initiatives were primarily distributed across our levers in this way.**



At this time, Well Being Trust is not accepting unsolicited applications for funding.



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*We are grateful to the more than 200 persons, and their organizations, who have generously provided their time, talent and treasure in 2017 to support the healthy birth and first year of Well Being Trust.



CHAIR: Maureen Bisognano
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19th U.S. Surgeon General

ADVISORY COUNCIL*

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Terri Ludwig
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*Initial group. At the time of printing, a number of additional leaders from diverse perspectives, sectors and backgrounds are in the process of joining the Well Being Trust Advisory Council.

LOOKING AHEAD: A SHARED AGENDA FOR WELL-BEING IN THE NATION

With our partners, Well Being Trust is committed to advancing clinical, community and cultural change that transforms our nation's health and well-being. Together, we are advancing a powerful movement that benefits individuals, families and communities across the nation.

In the years ahead, we will:

Accelerate clinical care transformation and integration across the spectrum of care. This evolution is occurring within our investor-partner health systems, and within their relative span of control, to ensure effective integration of mental health and substance use services that support whole-person care. We will raise up these transformative successes and engage other health systems to adapt and innovate. *Do together what none of us can do alone.*

Advance the national conversation that normalizes addressing mental health and substance misuse and supports social engagement with youth at the point of their lives where there is the greatest opportunity for impact. This work will engage millions of voices through social media dialogue, media partnerships and networks that engage youth as peer advocates to help them turn to one another and drive public policy. *Change the conversation.*

Increase the impact of our advocacy work to advance transformative policies. We will engage governmental structures at all levels by leveraging partnering health systems' relationships and advocacy capacity and working with leaders across the country in the development of a shared agenda through the Well Being Legacy initiative to provide leadership for promoting well-being in the nation.

Increase support for a well-being agenda by engaging thought leaders at conferences, in publications and at gatherings of key influencers across the country. To do this, we are partnering with the Bipartisan Policy Center, Kennedy Forum, United States of Care, Academy Health, Alliance for Health Policy, Nonprofit Finance Fund, Prevention Institute, Cities Thrive and more. *Partner!*

Invest in and share tools and resources to amplify effective practices, policies and approaches for impact at scale. We will package and disseminate what we learn from our investment portfolio in ways that can readily be used by health systems and communities nationwide. We'll convert our learning into comprehensive change packages with adaptive advising and replicable programs that can be scaled and spread. *Make doing the right thing easy!*

We recognize that this work cannot have the needed impact if it is driven by any one organization. It needs to be co-owned by all of us and informed by the wisdom of people, organizations and communities who are producing results that benefit us all. While we are committed to changing health care and the systems providing that care, we are simultaneously codifying and amplifying what the nation's communities are saying about what works for their health.

Before us is the potential for a convergence on mental health—a transformative national, state and local commitment to implementing effective solutions for care and community while creating a culture of well-being. By focusing on what works, this convergence can accelerate organizational change, even as it transcends partisan and other divides.

By leading from where you serve, please join us in advancing a shared mission for well-being in the nation!

ENGAGE!

Together, we have the opportunity to ensure that every person in every community has the conditions and support to achieve well-being. The first and most important step we can take together is to turn to one another as people, as organizations and as communities. We have a choice. We can witness the trajectories of change that continue to move in unhealthy directions

or we can choose to engage together to create a culture of mental, emotional and social well-being. This requires that we reach out to one another, get involved in our community, speak up, ask the tough questions, find solutions and invest our resources to push for the change we know we want.

We invite you to:

- 1** Join our mailing list at www.wellbeingtrust.org.
- 2** Join the movement and engage with us on social media using #BeWell, #BeHeard, #BeThere.
- 3** Make time for yourself and to be present with those you love.
- 4** Take a stand and promote well-being at school, at work, at worship, in your community.
- 5** Get engaged in civic activity that impacts well-being in your community and state.

Connect and engage at www.wellbeingtrust.org. For more information about becoming involved as a supporter or partner, contact info@wellbeingtrust.org.





IT'S AMAZING TO SEE A SIMPLE IDEA TURN INTO SOMETHING SO BIG, SO QUICKLY.

March 2018

A year ago, in February 2017, I joined a group of 65 leaders from across a variety of sectors, fields and perspectives to talk about the urgent need to address mental health and resilience across the country. We shared ideas and inspired each other with this challenge: Could we build an organization dedicated to improving the mental, social and spiritual health of the nation? What are the greatest needs? Who would come to partner? How could we inspire others?

I had no idea that in just a few short months we would see that simple idea grow into a clinical transformation plan, a national policy report, multiple funded grant projects, a staff team of thought leaders and innovators, an impressive and growing Advisory Council of national leaders, and a growing movement to better integrate mental and physical health.

We are seeing the potential for impact through collaborations between health care systems and other assets in our communities. The progress that Well Being Trust has made since that day in February 2017 has been stunning, and it shows that there is a passion to do more, to do better, for health care and for shared well-being in this country.

I am honored to serve as Advisory Council chair for this remarkable organization, and I look forward to doing even more good work in 2018. I hope you'll join us.

Maureen Bisognano

President Emerita, Institute for Healthcare Improvement, and Chair, Advisory Council, Well Being Trust

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