



HONORING YESTERDAY.
PLANNING FOR TOMORROW.

2012 ANNUAL REPORT

The Madison Valley Medical Center

Foundation

*"Supporting high quality healthcare with
modern services and qualified professionals"*

CONTENTS

- 2 Content Page
- 3 Our Mission, and Vision and Leadership
- 4 Looking Back...Looking Forward - Message from President
- 5 Statement of Financial Position
- 6 Investing in the Mission - Philanthropy Highlights
- 7 Accomplishments
 - Legacy Society
- 8 Partners In Caring
- 9 Honor Roll of Donors
- 10 Honor Roll of Donors
- 11 Honor Roll of Donors
- 12 Cornerstone Club
- 13 Honorary and Memorial Gifts
- 14 Ways of Giving to the Future

(Cover photo donated courtesy of Shanna Mae Photography)

OUR MISSION

Madison Valley Medical Center Foundation is a community based, not-for-profit corporation, which exists to inspire gifts and grants from individuals, foundations, corporations and other entities to support the health and well-being of people in Madison County and adjacent communities throughout southwestern Montana.

OUR VISION

Madison Valley Medical Center Foundation will be the premier organization for ensuring the understanding and funding of health and wellness needs in our region.

- ◆ As the philanthropic arm of the Madison Valley Medical Center, the Foundation develops resources to make a positive impact on the health of our community through support of the Medical Center's mission and priorities.
- ◆ We will maximize annual support to meet immediate needs and develop a strong endowment to allow flexibility for future capital and special project needs.
- ◆ We will strive to exceed the expectations of our donors and our community through diligent leadership and exemplary stewardship.

LEADERSHIP

On behalf of the Madison Valley Medical Center Foundation Board of Directors, we are extremely grateful to - individual donors, local businesses and organizations, employees, physicians, and volunteers - who have collaborated and contributed to the strength of the Foundation to bring the very best in quality healthcare to those in our community.

BOARD OF DIRECTORS

Mary G. Oliver, President

Steve Love, Vice President

Kim Montag, Treasurer

Teresa Dockery, Secretary

Gerry Geron

Heidi Gildred

Rebecca Zabel

John Bishop, MVMC

Dottie Fossel, MVMC

Manny Hoag, MVMC

FOUNDATION STAFF

Christie S. Trapp

Executive Director

Donita Powell

Executive Director Assistant

LOOKING BACK...LOOKING FORWARD MESSAGE FROM THE PRESIDENT

LOOKING BACK...

...the close connection between the Madison Valley Medical Center and its neighbors throughout the Valley reveals a unique Spirit of Giving, a relationship characterized by people caring for the Medical Center that cares for them. Without the generosity of our dedicated supporters – gifts of time from our volunteers, gifts of discernment and leadership from our board members, and gifts of financial treasure from our donors, expert medical staff and physicians would not have access to the resources, programs and state-of-the-art technology needed to provide the best possible care.

Over the past year, the Madison Valley Medical Center Foundation was the beneficiary of \$529,000 in philanthropic giving through individual donations, event proceeds, a bequest, and more. These gifts allowed the Foundation to fulfill some important needs such as investing in capital equipment purchases, funding of programs and services, and providing a scholarship to a medical professional to enhance their education and training.



LOOKING FORWARD ...

... it is the uniquely human capacity for awareness of the present moment, wrote the great historian Carl Becker, that leads people to connect what is happening now with the past and with the future. As we think about today's Medical Center, we inevitably recollect yesterdays and imagine tomorrows.

Looking forward to the next phase in the Foundation's master plan, we are excited to announce in fiscal 2013 our endowment campaign – a vital philanthropic effort to raise funds for future equipment which will allow us to invest in the community's healthcare and wellness needs. Your investment in the Foundation's endowment will save lives and impact the health of our community for many years to come.

In closing, we value the partnership of our community and the remarkable relationships that have helped shape and define not only our past ... but also our future. Thank you for being part of our family.

With sincere appreciation,

A handwritten signature in dark ink, reading "Mary G. Oliver". The signature is fluid and cursive, with a large loop at the end.

Mary G. Oliver

President | Madison Valley Medical Center Foundation Board of Directors

Senior Vice President | First Madison Valley Bank

STATEMENT OF FINANCIAL POSITION

Madison Valley Medical Center Foundation's philanthropic activities resulted in the following financial summary for fiscal year 2012 (October 1, 2011 – September 30, 2012).

ASSETS	
Current assets	
Cash and cash equivalents	\$ 377,072
Pledge receivables - current portion	53,465
Total current assets	<u>430,537</u>
Capital assets	
Equipment and furniture, net	3,560
Software, net	5,350
Total capital assets	<u>8,910</u>
Other assets	
Pledges receivables	33,500
Assets held for sale	283,460
Total other assets	<u>316,960</u>
Total assets	<u><u>\$ 756,407</u></u>
LIABILITIES AND NET ASSETS	
Liabilities	
Current liabilities	
Accounts payable	\$ 391
Payroll liabilities	3,458
Total current liabilities	<u>3,849</u>
Net assets	
Unrestricted	
Designated for brick memorial	705
Designated for Foundation operations	91,000
Designated for signage	22,229
Undesignated	410,897
Temporarily restricted	<u>227,727</u>
Total net assets	<u>752,558</u>
Total liabilities and net assets	<u><u>\$ 756,407</u></u>

INVESTING IN THE MISSION - PHILANTHROPY HIGHLIGHTS

Raising funds in the current economic climate is not for the faint-hearted. But thanks to the combined efforts of an engaged board and active participation of Medical Center trustees, we raised \$529,000 in donations which represents another record year for the Foundation.



The exceptional care offered at the Medical Center, and the great fundraising success we have achieved to advance its mission, makes me proud to be affiliated with this organization and underscores the value of the Foundation's work. The Foundation is fortunate to have such farsighted and generous friends and supporters.

In the past as in the present, our donors have moved the institution from strength to strength. As I look to the future, I feel confident that tomorrow's Madison Valley Medical Center will continue to meet the terms of its mission with vigor and success.

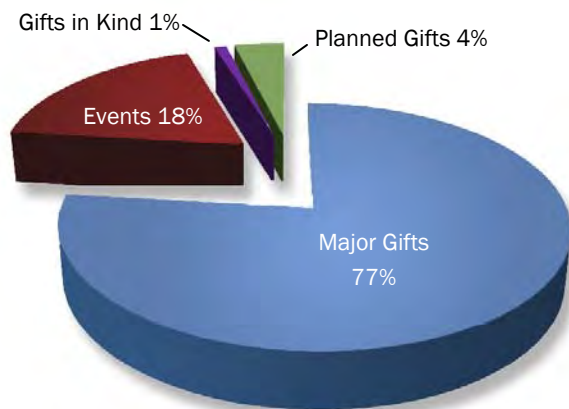
Christie S. Trapp

Christie S. Trapp

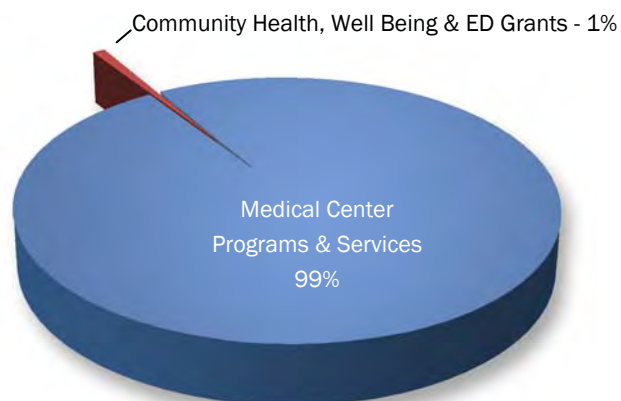
Executive Director | Madison Valley Medical Center Foundation

2012 FISCAL YEAR

WHERE THE MONEY COMES FROM



WHERE THE MONEY GOES



THE MADISON VALLEY MEDICAL CENTER FOUNDATION ACCOMPLISHMENTS

Recognizing that residents and visitors to the Madison Valley are a worthy investment, the community gave more than \$529,000 to support the life-saving work provided each day at the Madison Valley Medical Center. Consistent support helps sustain the Madison Valley Medical Center's mission to be the most effective provider of healthcare services in our region.

- ◆ Money raised for the Medical Center to purchase a DEXA Scan for bone density testing.
- ◆ Money raised for the Medical Center to install retrofits to Emergency Room doors.
- ◆ Money raised for the Medical Center to purchase lab equipment.
- ◆ Money raised for the Medical Center to purchase digital x-ray diagnostic imaging equipment.
- ◆ Money raised for the Medical Center to install parking lights, parking lot signs, shrubs, flowers and trees around the Medical Center complex to be enjoyed year-round by patients, their friends, and families.

Installed the planned Donor Wall honoring all supporters from 2005 -2010 who gave \$1 to \$1,000,000 dollars toward the building campaign of the new Madison Valley Medical Center.

LEGACY SOCIETY

The Legacy Society offers the opportunity to create a personal legacy to benefit the Medical Center. Through compassion and foresight, Planned Gift donors allow the Foundation to fund various needs to make a difference in the health of the community.

At the Madison Valley Medical Center Foundation, the concept of legacy is uppermost in all we do; for there is nothing more compelling than knowing that the work we do now will provide comfort and care for years to come for people we may never know.

Estate and Planned Giving is one of the most convenient, valuable and tax favorable ways for supporting the work of the Madison Valley Medical Center.

The types of planned gifts include:

- ◆ Bequests
- ◆ Bank Accounts and CD's
- ◆ Charitable Gift Annuities
- ◆ Life Insurance
- ◆ Charitable Lead and Remainder Trusts
- ◆ Life Estate Contracts

This year, it touches our hearts to know that Wells F. "Bud" Morris Jr. remembered the Madison Valley Medical Foundation with an estate gift. We are truly humbled by Bud's expression of support for our work. His generosity made an immediate difference in the health and lives of those in the Madison Valley.

PARTNERS IN CARING

The following major benefactors in fiscal year 2012 (October 1, 2011 through September 30, 2012) have reached an overall total giving level of \$10,000 or greater to the Madison Valley Medical Center Foundation.

Porter Bennett and Carolyn Quan

Lisa Canter

Lawrence and Beverly Dale

The Fossel Family Foundation

Don and Kathryn Houseman

Luther and Teresa King

Stan and Ann Kroenke

L Heart Foundation, Inc.

Wells F. "Bud" Morris Jr.

The Otter Cove Foundation

Dr. Howard and Brenda Sheridan

Michael Terry and Mary Deloache

Phillip and Tracy Uihlein

Anonymous Donor

**Anonymous Fund of the
Montana Community Foundation**



**Featured Partner In Caring —
The Fossel Family Foundation**

Philanthropy has always been a priority in the lives of the Fossel Family. The Fossel Family has a strong commitment about giving back to the community. A philosophy the Family lives by ... "if we are able, we should all give back in some way." Giving can be found in many forms - not just monetary. "Volunteer as a member, a leader, or a coach for a local organization. There are endless ways to contribute and make a difference in the community we enjoy being a part of."

In addition, as parents we want to instill the joy of giving in our children and serve as role models to help them achieve all they are capable of being. Often referred to as "practice what you preach" the cliché you yourself should do the things you advise other people to do, is fitting, as Dottie has worked in the past as a school nurse-teacher and also as an RN in a small community hospital. "It is appropriate for the Fossel Family to support the Madison Valley Medical Center and community well-being. We know when we give to the Madison Valley Medical Center; it will make a genuine difference each day in the lives of many of the friends, neighbors and family that the Medical Center touches."

HONOR ROLL OF DONORS

351 Gifts

Thank you to the individuals, companies and organizations that made 351 gifts during fiscal year 2012. The following contributors generously collaborated with the Madison Valley Medical Center Foundation in fulfilling its mission of providing high quality, compassionate healthcare for our community.

The following lists reflect gifts received during the period October 1, 2011 through September 30, 2012, which are not listed previously in this report. Every effort has been made to ensure accuracy in listing all donors. We apologize for any omissions or errors. (Donors listed alphabetically by overall total giving level in each category)

\$5,000 to \$9,999

Going To The Sun Rally CSP

Montag, Jeff and Kim

Scott, Sam and Sherry

Thom, Leroy and Jean

\$1,000 to \$4,999

Atkinson, David and Patricia

Braxton, Terry and Karin

Brennan, Mark and Dana

Brown, Dr. Randolph and Marilyn

Butcher, Preston and Carolyn

Carpenter, Bill and Sylvia

Clapp, David and Connie

Clark, Donald

Dochnahl, John and Janet Bean

First Madison Valley Bank

Fosnot, Robert and Leigh

Fossel, Dottie

Gildred, Ted and Heidi

Goldberg, Frederick
and Lakewold, Carolyn

Kempner, James C.

Lancaster, Robert Payne

Madison Valley Woman's Club

Martin, Sandy and Nancy

McMullin, Carol

Miller, Ron and Judy

MVMC Auxiliary

Nelsen, Bob

O'Neel, Jack and Ginny

Pruder, Donald K.

Saltchuk Resources, Inc.

Schutts, Alan and Pat

Scudder, Donald and Martha

Scully, John and Antoinette

Sparkman, Howard

Sparkman, Mrs. Ben

Wagner, Dr. John R. and Beverly A.

Walker, Tom

Wyler, Don

\$500 to \$999

Alton, Dr. Kirby and Janice

Barker, Brian and Sally

Beck, Bob and Katie

Bing III, Alexander and Cynthia

Burchenal, Ralph

Collopy, Tom

Cypress Healthcare, LLC

Double R Drygoods

Ennis True Value Hardware

Finkle, Dr. Bryan and Mary Deyman

Foreman, Jud and Lynn

GE Foundation

Griffin, Tom and Mary

Hale, David and Pat

Holmes & Turner, CPA's

Kidd, Barron and Jane

Krokes, Larry and Diane

Lantow, Susan

Leonhardy, Lee Nelles

Marks M.D., Dr. R.D. and DeGroot,
Lisa

Marks, Robert and Barbara

McClellan, Anna

Pollak, Mr. and Mrs. James M.

Roberts, John and Jaime

Townshend, Deb

VanDerhyden, Richard D.

Webster, Dante and Jeannette

\$499 & Under

Aigner, Dennis and Bertolet, Camille

Ames, Anita

Anderson, Jack and Barbara

Ardisson, Linda

Armstrong, Raymond and Margaret

Arnheiter, Lyle and Priscilla

Auge, David and Elizabeth

Bahnsen, Steve

Baker, Daniel and Kimberly

Baker, Gary

Bauchman, Rick and Galen

Bayley, Bob and Shirley

Beimel, George and Sibille

HONOR ROLL OF DONORS CONTINUED

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\$499 & Under

Bell, Jeffrey and Kristi	Crum, Dr. Paul	Goggins, Elizabeth
Bourgeois, Bill and Sandi	Dale, John and Bridget	Goltz, Howard and Mary
Bowen, Don and Toni	Daluiso, Norm and Judy	Green, Ronald
Bowles, Chip and Tana	DeBrito, Vivian C.	Gregg, Deborah
Brandt, Rob and Jenn	Dirks, Barbara	Grobe, Roger and Peggy
Brekhus, Pete and Agnes	Dockery, Kenneth and Teresa	H.F. Hardy Painting
Brinkoeter, Mrs. Colton	Doherty, Marianne	Hajny, Dave and Marie
Brooks, Kathryn	Donnelley, Thomas and Barbara	Hall, Ken and Penny
Brooks, Paul and Deborah Flannery	Dour, Tammi	Hardy, Jeanne
Browne, Tom	Dringle, Bill and Karen	Harrison, Henry and Margaret
Calkins, Robert and Kathy	Duncan, Douglas and Mary	Harrison, Robert
Carpenter, Kathy	Duncan, John and Janet	Hartman, Art and Jeanne
Chester, Trudy	Duval, Frank and Janice	Hauck, John and Kris
Childs, John	Dye, Carol T.	Heaston, Joe and Patti
Chirdon, Gordon and Linda	Eckert, Harvey and Patsy	Heese, Paul and Lorraine
Christensen, Mr. and Mrs. Vern	Ellinwood, Howard and Norma Jean	Heringer, Ralph and Linda
Christensen, Sandra	Elliot, Steve and Marthe	Herold, John and Kelly
Christopherson, Mark and Brenda	Elser, Marc and Gail	Hoag, Mansfield and Barbara
Church, Charles	Ennis RV Village	Hocking, Rex and Penny
Clausen, George and Mary	Ennis, George and Lucy	Horner, Eddie and Dolly
Clement, Walt C. and Alberta	Everts, James and Janice	Horton, David and Carol
Cleverley, Janice	Feskanin, Rick and Alde	Hovan, Paul and Judith
Coffman, Charles and Debora	Filby, Dr. Evan and Caroline	Hunter, Harold and Judy
Coffman, Jan	Fossel, Scott and Petria	Hutton, William T. and Lynda
Collins, Herschel R.	Frey, Jim and Judie	Jack, Joan M.
Coor, William Scott and Debra Anne	Frings, Myles	Jackson, Micky W. and Judy
Cornely, Larry and Bonnie	Garcia, Jim and Cheryl	Jacobson, Loren and June
Costello, Fred and Ann	Garland, Richard	Jensen, Mitchell and Lisa
	Germann, Robert and Natalie	Kack, James and Joanne

HONOR ROLL OF DONORS CONTINUED

\$499 & Under

Kent, Jack and Marjorie	Powell, Bill and Donita	Stewart, John T.
Kent, Neil	Prindle, Austin and Marjorie	Stilwell, Thomas and Deanna
Kilman, Lester and Pearl	Reck, Robert and Margie	Storey, Shirley
Kilmer, Sharon	Reid, Frank A.	Strickland, Ray and Linda
Klaber, Larry and Valerie	Reilly, Dennis and Stephanie	Taylor, Gurney and Peggy
Klatt, Lester and Bobby	Reilly, John and Carol	Terrill, Else
Klein, Jonathan and Marianne	Rice, Greg and Karen	Tezak, Tony and Connie
Kreider, Robert and Sue	Richardson, Harold	Tichenor, Monty and Melinda
Kyles, Allen and Bonnie	Rodorigo, Mark	Tobacco Root Garden Club
LaBar, Ruth	Root, Ian and Heald, Susan	Trapp, Eric and Christie
Landrigan, Edward and Margaret Judith	Ross, Bob and Shirley	Tucker, Dale and Rhea
Laszlo, Andy and Paulette	Russell, Ronald and Kathleen	Tucker, Loren and MaryAnn
Laszlo, Anne	Rybus, Jane	Verdon, Mike and Jill
Laszlo, Jeffrey	Saier, Karl	Vujovich, Josh and Becky
Lee, Robert B. and Patricia	Sammons, John and Meg	Walsh, Doug and Sharon
Legg, William	Schauwecker, Thomas	Walsh, Lois
Legler, John and Avis	Schenk, David and Nancy	Watkins, Walter and Dorothy
Leslie, Dr. Hugh and Mildred Arlene	Schulz, Clay and Locati, Elaine	Welch, Eugene and Karen
Lielke, Mary	Schwarz, Roy and Thelma	West, Cedar and Marilyn
Loretta, Bill and Marie	Scott, Drew and Parker	White, Drs. Mike and Eileen
Love, Marvin and Terry	Segal, William and Elizabeth	Williams, Bob and Kris
Luebke, Dr. and Mrs. Robert and Nani	Shanna Mae Photography	Wingard, Harold and Elizabeth
Lukas, Joseph and Leslie	Shirley, Craig and Charity Fechter	Witt, William and Janice
Mad Gals	Sigman, Gary and Judith	Wood, Dick and Mary
Magnante, Mary Anna	Simpson, Allan and Virginia	
Manley, Joe and Carolyn	Sisel, Dale and Karen	
Morningstar, Leslie	Slaton, Bill and Newton, Kent	
New, Edward and Kaylee	Smidansky, Kurt and Derval	
Oakley, Cledith and Dinah	Smith, Calvin and Alice	
Oliver, Mary Gates	Snipper, Stephen and Lorraine	
Olson, Mr. and Mrs. Larry	Spainhower, Ron	
Parsons, Ben and Hunter, Georgia	Sprout, Jody	
Pfau, Ron and Sandi	Stabler, Laird and Patricia	
	Stahn, Lynn	

CORNERSTONE CLUB

The Cornerstone Club is the Foundation's foremost philanthropic recognition group. Through the Cornerstone, donors become part of the heritage established when the Medical Center's founders placed the original cornerstone in 1950 - a strong tradition of philanthropy and community giving.

Cornerstone Club members are individuals who make a commitment pledge annually, that is payable over a period of four quarters in a calendar year. This is a wonderful example of how the generosity of donors at all levels of giving provide financial support that enables the Foundation to continue its mission.

CORNERSTONE CLUB MEMBERS

Members are listed alphabetically, *Indicates Founding Member

Kathryn Brooks*

Bill and Sylvia Carpenter

John and Janet Duncan*

Dottie Fossel

Manny and Barbara Hoag

Anna McClellan*

Marlene Moen*

Harold Richardson*

Sonny and Jan Smith*

Josh and Becky Vujovich

HONORARY AND MEMORIAL GIFTS

Madison Valley Medical Center Foundation considers it the highest compliment when we are entrusted to use gifts given in honor or memory of a loved one, friend, or associate for the benefit of our community.

IN HONOR OF

Mary Ann Alger	Keven and Stacy Palmer
Dr. David J. Ban	John and Barbara Pavkovich
Maisy (Madison) Barsdale	Walt and Joan Pease
Dr. Paul Buse	Hector and June Santiago
Steve Cain	Sam and Sherry Scott
David and Connie Clapp	John and Antoinette Scully
Dennis and Lynn Dolph	Chris and Amy Smith
Dottie Fossel	Judith Thompson
Ted Gildred	Dr. Brad White
Dr. Connie Gipstine	Dr. Jeffrey Zuke
Henry and Magie Harrison	
Dr. John Hess	
Dr. Brad Kessler	
Dr. John Laird	
Ann and Jeff Laszlo	
Carol Orr	

IN MEMORY OF

Norman Ashcroft	Roy Moen
Marcele Bohleen	Richard Peerson
John Branger	George Raush
Topper Bronaugh	Rose Reinoehl
Janice Epperson	Fred Rentschler
Irene Graden	Harold W. Reynolds
Jack C. Hardy	Robin Shipman
Tony Hartman	Adeline Storey
Richard L. Henderson	Robert Storey
Donald L. Jack	Jim and Lorelyn Walker
Frederick LaBar	Gene Walsh
John Robert Lantow (JL)	Lucille Wellman
William Shepardson	Larry Zabel
Lantow (Shep)	
Andrew Laszlo	
Walt Lielke	
Mac and Billie McPhetres	
Tim Merica	

WAYS OF GIVING TO THE FUTURE

Giving back to your community while realizing your goals for today and creating your legacy for tomorrow.

<i>If Your Goal Is To:</i>	<i>Consider:</i>	<i>Benefits:</i>
Improve ongoing medical programs, equipment and operations.	ANNUAL GIFT	<p>You may request that your gift be directed to the program or department of your choice, or to the areas of greatest need at the Medical Center.</p> <p><i>Donate: Cash - Appreciated Securities - Real Estate</i></p>
Make a gift to the Medical Center in concert with personal long-term financial and estate planning.	ESTATE GIFT	<p>Leave a lasting legacy by naming the Medical Center as a beneficiary in your will or trust.</p> <p><i>Donate: Life Insurance Policies - 401(k) - IRAs or other retirement plans</i></p>
Increase your retirement income and support the Medical Center at the same time.	LIFE INCOME GIFT	<p><i>Charitable Remainder Trust:</i> Avoid capital gains taxes on appreciated property, increase personal income and reduce income taxes.</p> <p><i>Charitable Gift Annuities:</i> Increase retirement income and reduce taxes. Fixed rates, as high as 10%, based solely on age, and guaranteed for life.</p> <p><i>Donate: Cash - Appreciated Securities - Real Estate</i></p>
Build the future of healthcare by investing in state-of-the-art technology, construction and/or renovation of a medical department.	CAPITAL GIFT	<p>Opportunity to name a department in your honor or as a tribute to a loved one.</p> <p><i>Donate: Cash - Appreciated Securities - Real Estate - Income from a Charitable Lead Trust</i></p>
Ensure funding of your favorite department, or physician in perpetuity.	ENDOWMENT FUND	<p>Funds are invested and resulting interest received provides ongoing income for the purpose designated by you. At certain levels, endowments may bear your name or the name of a person of your choosing.</p> <p><i>Donate: Cash - Appreciated Securities - Real Estate</i></p>
Donate a gift of goods or services.	IN-KIND	<p>Tax deduction for value of goods or services.</p> <p><i>Donate: Goods - Services</i></p>

We try to minimize our use of paper by utilizing our website for annual report storage. If you do not wish to receive copies of this report in the future, write us and ask to have your name removed from our mailing list.

The Madison Valley Medical Center Foundation has tried to be as complete and accurate as possible in listing contributors for the 2012 fiscal year. If a mistake has been made or a name omitted, please notify our office at 406-682-6641.

As always, we thank you for helping us provide the highest quality healthcare to citizens of the Madison Valley and southwestern Montana. Visit us at www.mvmcf.org.

