

MADISON VALLEY MEDICAL CENTER FOUNDATION, INC.

THE RIGHT PATH TO THE BEST CARE

FY 2016 ANNUAL REPORT



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Stewardship Report From the President

→ Philanthropy is a catalyst for the transformation of our community's health. Your philanthropic connection creates vital new programs and empowers physicians and their teams to accomplish extraordinary things.

**YOUR GENEROUS SUPPORT
+
MVMC'S AMAZING STAFF
=
EXTRAORDINARY THINGS**

391

GIFTS RECEIVED FROM
DONORS IN FISCAL YEAR 2016

A DEDICATED TEAM



Founded in 1988, the Madison Valley Medical Center Foundation is an independent, nonprofit corporation headed by an nine-member volunteer Board of Directors. These dedicated civic and business leaders generously donate their time, talents and energy to direct the Foundation's policies and ensure its financial future.

BOARD OF DIRECTORS

KIM H. MONTAG, PRESIDENT
AMY KELLEY, VICE PRESIDENT
JOSH VUJOVICH, TREASURER
HEIDI GILDRED, SECRETARY
SUZ RICHARDS
TIM COMBS
ALLEN S. ROHRBACK JR., MVMC
DOTTIE FOSSEL, MVMC
MANNY HOAG, MVMC

FOUNDATION STAFF

CHRISTIE S. TRAPP
EXECUTIVE DIRECTOR

OUR MISSION

Madison Valley Medical Center Foundation is a community based, nonprofit 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 to ensure the health and wellness needs in our region are not only met, but exceeded.

- As the philanthropic arm of the Madison Valley Medical Center, the Foundation develops, manages, and distributes resources to advance the delivery of high-quality health care by the Madison Valley Medical Center to make a positive impact on the health of our community.
- We maximize annual support to meet immediate needs and are growing long-term funds to allow flexibility for perpetuity and future innovation.
- We work to exceed the expectations of our donors and our community through diligent leadership and exemplary stewardship.

WORKING AS



FOR EVERYONE.

THE FOUNDATION'S STRENGTH IS DERIVED FROM THE GENEROUS SUPPORT OF INDIVIDUAL DONORS, BUSINESSES AND ORGANIZATIONS WHICH IS INTEGRAL TO THE FOUNDATION'S SUCCESS AND, IN TURN, THE SUCCESS OF THE MADISON VALLEY MEDICAL CENTER.

MESSAGE TO YOU

OUR

success is largely attributable to the philanthropic connections we have made along the way. The ability to solve critical healthcare issues through community-wide collaboration and philanthropy is directly related to the number of connections we make in support of our vision and work.

And what a year! Significant involvement and financial commitment by supporters resulted in new donations totaling more than \$415,000 in fiscal year 2016. Through your support, you

make it possible for the Medical Center to be on the right path to provide the best care by strengthening and enhancing health services and treatments which in turn provide better health outcomes for residents and visitors to this community.

During the summer, donors concerned about the Medical Center's ability to support Women's Health needs attended the Alice in Wonderland Fundraiser Luncheon and donated more than \$75,000 towards the purchase of a Hologic® 3D mammography system for the Medical Center. It is so gratifying

to see how your contributions toward advanced capabilities, such as Mammography, have dramatically impacted and saved lives in this community. Thank you!

In closing, the Board of Directors and the Executive Director join together to express our sincere appreciation for your compassion and connection with the Madison Valley Medical Center Foundation to improve the health and lives of others. We are humbled each year by your continued generosity, and we deeply appreciate the trust and resources you invest with us.

..... ➔ **IN GOOD HEALTH,**



Kim H. Montag

KIM H. MONTAG | PRESIDENT
Madison Valley Medical Center Foundation Board of Directors



Christie S. Trapp

CHRISTIE S. TRAPP | EXECUTIVE DIRECTOR
Madison Valley Medical Center Foundation

TOGETHER
WE CAN GO
FURTHER

PHILANTHROPY
IS BEING ABLE
TO AFFECT THE
FUTURE.

"Your donations and participation in Foundation events helps the Medical Center fulfill its mission and provide the highest standards of care and service to those we serve. You, make a significant difference, and I am deeply grateful."

ALLEN S. ROHRBACK, JR.
Madison Valley Medical Center CEO





OUR SUPPORTIVE
COMMUNITY



A GIFT TO THE FOUNDATION
HOLDS GREAT POWER TO
HELP THE MADISON VALLEY
MEDICAL CENTER CONTINUE
TO LEAD IN THE HEALTH OF OUR
COMMUNITY AND TO BE ABLE
TO OFFER AN UNPARALLELED
PATIENT EXPERIENCE.

The following pages pay tribute to all those who supported the Madison Valley Medical Center through generous donations to the Foundation in fiscal year 2016 (October 1, 2015 through September 30, 2016). We offer our deepest gratitude to all the following donors and greatly appreciate the support received at all levels. Every effort is made to list our donors as they prefer and we apologize for any omissions or errors.

\$50,000 TO \$99,000

Canter, Lisa
Fossel, Dottie

\$10,000 TO \$49,000

Allen, Barry K. & Linda P.
Anonymous
Braxton, Terry & Karin
Burke, Stephen & Gretchen
MVMC Auxiliary
Nelson, Stephen
O'Neel, Jack & Ginny
Sheridan, Dr. Howard & Mrs. Brenda
The Ed & Yvonne Parish Foundation
Thom, LeRoy & Jean & T-L Foundation Inc.

\$5,000 TO \$9,999

Dale, Lawrence & Beverly
Madison Valley Woman's Club
Terry, Michael & Mary
The Catholic Foundation of Northern Colorado/T&F Family Fund
The Double F Foundation

\$1,000 TO \$4,999

Alsted, Don & Ann
Alton, Dr. Kirby & Mrs. Janice
Amicus Foundation, John & Sheila Lake
Anonymous
Arnold, Scott & Chris
Atkinson Foundation, David R. & Patricia D.
Barker, Brian & Sally
Blue, Charlie & Judy
Carpenter, Bill & Sylvia
Chevron Matching Employee Funds
Clapp, David & Connie
Deaver, Richard & Barbara
Ennis True Value Hardware
Gildred, Ted & Heidi
Goldberg, Frederick & Lakewold, Carolyn
Grey, Richard & Caroline
Haddy, James
Hutchinson, K.E.
Laszlo, Andy & Paulette
Luther & Teresa King Family Foundation
Martin, Sandy & Nancy
Mercer, Bill & Diamond, Quinn

Miller, Ron & Judy
Milner, Mike & Nina
Mohr, Richard & Elizabeth
Montag, Jeff & Kim
Pollock, Sterling G.
Rentschler, Pam
Rosin, Carolyn
Saltchuk Resources, Inc.
Scudder, Donald & Martha
Wagner, Beverly A.
Weglicki, Tim & Denise
Whitacre, Russell & Kelly, Mary Ellen

\$500 TO \$999

Anonymous
Bennett, Porter & Quan, Carolyn
Bowen, Don & Toni
Brennan, Mark & Dana
Browne, Tom
Chirdon, Gordon & Linda
Combs, Tim & Reinsch, Lea Anne
Courture, Peter
Crosby, Lawrence & Veronica
English, Ronald & Jeanne

Ennis Lions Club
Don M. & Kathryn B. Houseman Fund
Graham, Bob & Annie
Griffin, Tom
Hale, David & Pat
Hardy, Jeanne
Johnson, Leora
Kelley, Scott & Amy (In-Kind)
Krokes, Larry & Diane
Legg, William
Leonhardy, Lee Nelles
Nassetta, Mr. & Mrs. Paul
Oglietti, Bernard & Patrice
Owens, Brett & Rita
Rowley III, Mr. H. Nelson
Scully, John & Toni
Slaton, Bill & Newton, Kent
Stonebraker, Judi
Taylor, James & Valerie Anne
Tucker, Loren & MaryAnn
VanDerhyden, Richard D.
Wolfearn, Frederick & Sara

\$499 & UNDER

Aigner, Dennis & Bertolet, Camille
Aldridge, Paul
Allison, James & Pamela
Ames, Anita
Anderson, Richard
Anderson, Sharon
Arbuckle, Merrill
Ardisson, Linda
Artemenko, Dolores
Anonymous
Auge, David & Elizabeth
Bagwell, Joseph & Nancy
Bahnsen, Steve
Baker, Daniel & Kimberly
Bauchman, Rick & Galen
Bauer, Gary & Martha
Beimel, George & Sibille
Berk, Dr. Leo & Mrs. Marty
Birkeland, Pamela
Bishop, John & Halsey
Bohleen, Gene & Coffman, Jan
Bowles, Tana
Bozeman Chapter MT Assoc. For The Blind

Bozeman, ERA Landmark Real Estate
Bricker, David & Diane
Brooks, Kathryn
Brooks, Paul & Flannery, Deborah
Brown, Dr. Randolph & Mrs. Marilyn
Brown, Pauline
Budelman, Jim & Anderson, Heather
Bullock, Larry & Gaylia
Burke, Steve & Shelly
Butz, Joel & Debra
Buxton, Robert & Patricia
Calkins, Robert & Kathy
Callaway, Mr. & Mrs. Frank
Carlstrom, Mr. & Mrs. Gene
Chester, Trudy
Christensen, H. Vern
Churchwell, Jerry & Lanelle
Clarkson Jr., Dr. & Mrs. G.S.
Clausen, George & Mary
Clavadetscher, Janine
Cleverley, Janice
Coghill, David
Crabtree, Dr. Michael
Crawley, David & Martha

\$499 & UNDER
CONT'D

Daniels, Patrick
DeBrito, Vivian
Dohnahl, John & Bean, Janet
Doherty, Marianne
Donich, Fred & Kitty
Dougherty, Dorothy
Duncan, Douglas
East, Carol Salisbury
Endecott, Mrs. Janet
England, Mr. & Mrs. Charles
Farrell, Dr. Val & Mrs. Dee Gee
Feskanin, Rick & Alde
Filby, Dr. Evan & Mrs. Caroline
Flawless Skincare LLC, Bambi Gress
Fluharty, Paula
Fowler, Jack & Judith
Freese, Mary Lou (In-Kind)
Gandenberger, Mr. & Mrs. Ken
Garcia, Jim & Cheryl
Gaughran, George & Kathleen
Gaulding, Roger
Gieck, Dr. Joe & Mrs. Sally
Glines, Daniel & Barbara
Goggins, Bob & Cora

Goggins, Elizabeth
Goltz, Howard & Mary
Griffin, Lynda
Grobe, Roger & Peggy
Haigh, June & Violet
Hauck, John & Kris
Hawkes, Joseph & Mary
Heaston, Joe & Patti
Heese, Paul & Lorraine
Hill, Colleen
Hill, Pamela
Hoag, Mansfield & Barbara
Hocking, Rex & Penny
Hodge, William
Holland, Dr. & Mrs. Pat
Horner, Eddie & Dolly
Hovan, Paul & Judith
Hudson, Larry & Diana
Humphrey, Ron & Kathy
Hutton, William T. & Lynda
Johnson, Ray & Theresa
Kahn, Timothy & Frances
Kehler, Arthur
Kelly, Jim & Anne
Kelly, Lonnie & Pamela
Kent, Jack & Marjorie
Kent, Neil (Rodger)

Klaumann, Stan & Martha
Knutson, Tony & Carol
Kreider, Sue
Kruger, Gene
Laszlo, Ann
Laszlo, Jeffrey
Legg, David & Melinda
Levin, Mark & Dora
Lindman, Warren & Danelle
Love, Steve & Diane
Luebke, Dr. Robert & Mrs. Nani
Lynes, Robert & Sandra
MVMC Employees
Maloney, Mark
Marks, Robert & Barbara
Mason, John & Margie
Mathews, Craig & Jackie
McCambridge, Elizabeth
Milford, Richard & Lorrie
Milner, Barry & Celia
Mitchell, Tom & Paula
Moen, Marlene
MT Anglers Hideaway, David & Susan Aced
Montgomery, Sidney & Gloria
Moran, Don & Bonnie
Morimoto, Dr. Allen
Morningstar, Leslie

Mountain View TV & Satellite, Inc.
New, Edward & Kaylee
Northway, Jack & Kathryn
Novikoff, Amy
Oakley, Cledith & Dinah
Orr, Wes & Diane
Osborn, Edward & Judi
Owens, Roberta M.
Papike, Rebecca
Papp, Raymond
Parsons, Ben
Pearce, Julie A
Pfau, Ron & Sandi
Pierce, Barbara
Redhouse, John & Susan
Reese, Susan
Reilly, Dennis & Stephanie
Reilly, Carol
Reinoehl, Dan
Restvedt, Ann
Reynolds, Jack
Richardson, Harold
Roberston, Gerald & Marilyn
Rochez, Fred & Darlene
Rodorigo, Mark
Roedel, Dwayne
Ross, Bob & Shirley

Rushing, Travis & Julie
Ryan, Linda
Sammons, John & Meg
Schilling, Joan
Scott, Paul & Diane
Segota, Virginia
Shelton, Mary
Sherick, Stephan & Doris
Shores, Karen
Sigman, Gary & Judith
Simpson, Allan & Virginia
Skank, Jynean
Smith, Jim & Jan
Smith, Lloyd Jr. & Janet
Smith, Patricia E.
Spensley, Dennis & Jan
Sprout, Jody
Stahn, Lyndell
Sterchi, Kathryn
Stewart, John T.
Stull, Edward & Marie
Swenson, Lawrence & Lonie
Thallmayer, Hans & Josie
Thibodeaux, Donald & Vern
Thomas, Milton & Janet
Timmons, Michael & Susan
Trapp, Eric & Christie

Tucker, Dale & Rhea
Vanderlans, Sandra B.
Vasconcellos, Lena
Walser, Lee
Ward, Billy & Teresa
Wasick, Phyllis
Wegescheide, Fred & Smith, Melissa
Welch, Eugene & Karen
White, Drs. Mike & Eileen
White, Harold & Gail
Williams, Bob & Kris
Witt, William & Janice
Wolcott, Richard & Robin
Wood, Dick & Mary

GIFTS GIVEN IN
HONOR OF

Robert & Shirley Bayley
Dr. David Ban
George Beimel
Jean Bolt
Don Bowen
Dr. Gina Bowers
Anne & Frank Callaway
Peter Thompson Combs Jr.
Dottie Fossel
Geoffrey Good

Marty Hensel, PA-C
Dr. Brad Kessler
Dennis & Karen Lanham
MVMC ER & Clinic Staff
MVMC Physical Therapy Dept. Staff
Dr. R. D. Marks
Ty McKay
Kim Montag
Jane Rybus
John & Toni Scully
Donald & Laurie Skillman
Nancy Smrcka
Dr. Andy Thomas
Sonny & Tamara Wood

GIFTS GIVEN IN
MEMORY OF

Alexander (Sandy) Bing
Marcele Bohleen
Michelle (Shelly) Segota Boss
Marge Bowersox
Arlene Brown
Cooper Burchenal
Ed Clark
Jim Clavadetscher
Bob Cleverley
Carolyn Darby

Bob Endecott
Stein Eriksen
Sharron Gecho
Gene R. Gillan
Ed Guinnane
Gloria Coppin Handelman
J. Lynn Hill
Robert Kreider
Frederick LaBar
Nancy Leadbeater
Dr. Hugh & Arlene Leslie
Marvin Love
Dave Mann
Roy Moen
Bob Nelson
Minnie & Ralph Paugh
Patricia R. Paugh
Lee Poole
Clair Rasmussen
John Rice
Max Strickland
Bill Struckman
Leon Thexton
Mary Kay Thomas
Gene Walsh
Lois Walsh
Mick Welton

THE FOUNDATION
IS TRULY GRATEFUL
FOR THE GROWING
FINANCIAL SUPPORT WE
ARE RECEIVING FROM
EACH AND EVERY ONE OF
OUR DONORS.

GUIDED BY AN
EXCEPTIONALLY TALENTED
FINANCE COMMITTEE, THE
FOUNDATION'S INVESTMENT
STRATEGY IS BASED ON
SOUND PRINCIPLES,
CONSISTENT INVESTMENT
AND LONG-RANGE PLANNING.

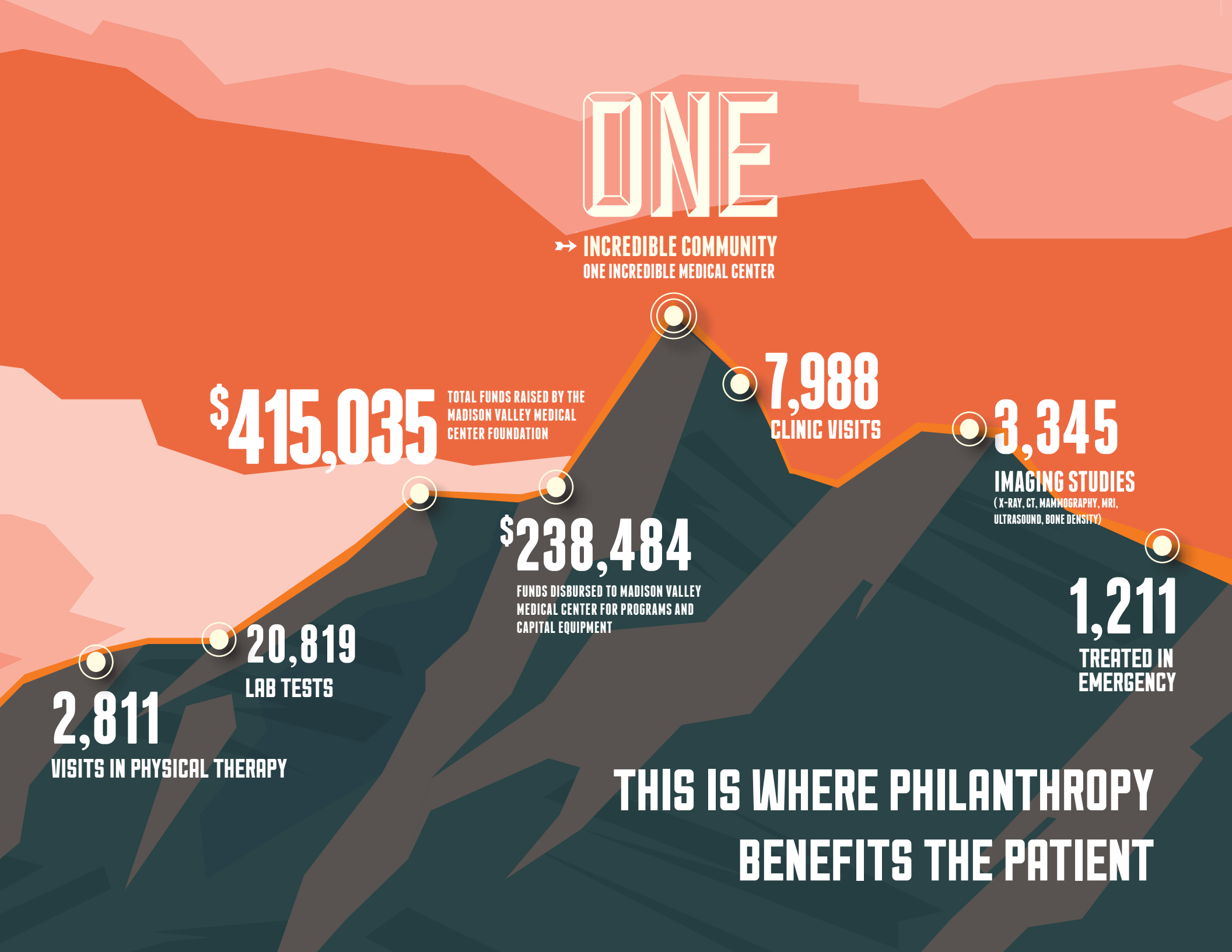
9.36%
RETURN

For Calendar Year 2016 the Foundation's investments returned (Net of fees) 9.36% , which is better than some of largest Foundations in the US such as: Harvard University -2%; Yale University 3.4%; Stanford University -.6 % for the same period.

STATEMENT OF
FINANCIAL POSITION

Madison Valley Medical Center Foundation's philanthropic activities resulted in the following financial summary for fiscal year 2016 (October 1, 2015 - September 30, 2016)

CURRENT ASSETS	
Cash	\$266,256
TOTAL CURRENT ASSETS	\$266,256
CAPITAL ASSETS	
Software and equipment, net	\$1,969
OTHER ASSETS	
Cash restricted for endowment	\$44,482
Cash restricted for capital fund and other programs	\$5,600
Beneficial interest in a Trust	\$1,942,911
Investments	\$1,012,139
Unconditional promises to give	\$523,527
Assets held for sale	\$4,950
Total other assets	\$3,533,609
TOTAL ASSETS	\$3,801,834
LIABILITIES	
Accounts payable	\$1,793
Payroll liabilities	\$3,810
TOTAL CURRENT LIABILITIES	\$5,603
NET ASSETS	
Designated for signage and brick memorial	\$1,548
Designated for Dr. Losee & Dr. Wilkins Capital Fund	\$112,122
Designated for Foundation Operations	\$200,000
Designated for Douglas D. Coppin Endowment	\$1,942,911
Undesignated	\$359,176
Temporarily restricted	\$261,033
Permanently restricted for General Endowment Fund	\$919,441
TOTAL NET ASSETS	\$3,796,231
TOTAL LIABILITIES & NET ASSETS	\$3,801,834



....➡ STEWARDSHIP REPORT
FROM THE PRESIDENT

AT a time when donors have many charitable choices, Madison Valley Medical Center Foundation understands its obligation to be accountable and transparent in the administration of the funds we receive. We are deeply committed to reporting the results of our stewardship to those who support us each year.

During fiscal 2016, the Foundation continued to make further progress in strengthening our long-term funds. At the end of the fiscal year, long-term funds represented more than \$2.9 million, a solid basis for our future. During the fiscal year, the Board selected Morgan Stanley as new investment advisors and transferred our holdings to them in January 2016.

Additionally, the Board created a separate endowment fund to retain funds to be received from a Trust for which the Foundation was the beneficiary, and created the Douglas D. Coppin Endowment Fund. We received the Trust funds in October 2016, but the beneficial interest has been shown on the Balance Sheet as a receivable since September 30, 2015 and the Foundation received the benefit of earnings since that date. Also, the Board determined to allow long-term funds to grow for a few years and did not approve of any distributions during this fiscal time period.

As investment earnings and additional donations help these long-term funds grow, the Foundation will be able to use the Fund’s earnings to support our mission priorities.

ACTIVITY REPORT ON MADISON VALLEY
MEDICAL CENTER FOUNDATION, INC.
GENERAL ENDOWMENT FUND

Date Fund Established	August 8, 2013
Net Assets as of September 30, 2016	*\$971,613 ¹
Investment Income during the Year	*\$52,172 ²
Income Distributed in Fiscal Year	\$-0-
New Contributions and Pledges in FY16	\$58,817
Net Assets as of September 30, 2015	\$860,624

ACTIVITY REPORT ON MADISON VALLEY
MEDICAL CENTER FOUNDATION, INC.
DOUGLAS D. COPPIN ENDOWMENT FUND

Date Fund Established	*October 13, 2016 ³
Net Assets as of September 30, 2016	\$1,942,911
Investment Income	\$60,911 ^(All unrealized income)
Income Distributed in Fiscal Year	\$-0-
Beneficial Interest in a Trust September 30, 2015	\$1,882,000

ACTIVITY REPORT ON MADISON VALLEY
MEDICAL CENTER FOUNDATION, INC.
DR. LOSEE & DR. WILKINS CAPITAL FUND

Date Fund Established	August 8, 2013
Net Assets as of September 30, 2016	\$114,843
Investment Income	*\$21,541 ⁴
New Contributions	\$7,075
Income Distributed in FY16	\$-0-
Net Assets as of September 30, 2015	\$86,227

1* \$919,441 Permanently restricted + \$52,172 Temporarily restricted
2* \$11,049 Unrealized income + \$41,123 realized income (interest, dividends, realized gains (losses), less fees
3* Notice of beneficiary interest received in August 2015
4* \$10,659 Unrealized income + \$10,882 Realized



WITH YOU AS OUR
PARTNER OUR
FOOTSTEPS CARRY
US DOWN THE SAME
PATH AND, WITHOUT
A DOUBT WE ARE
HEADED IN THE RIGHT
DIRECTION TO MAKE
A DIFFERENCE.



The Madison Valley Medical Center

Foundation
*Supporting high quality health care with
modern services and qualified professionals*

The Madison Valley Medical Center Foundation has tried to be as complete and accurate as possible in listing contributors for the 2016 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 MAKE A DIFFERENCE.**

Visit www.mvmcf.org