MADISON VALLEY MEDICAL CENTER FOUNDATION, INC.



FY 2013 ANNUAL REPORT TO STAKEHOLDERS

# GIVING STARTS ... With Vision

A local young brother and sister emptied their piggy bank to contribute to their charitable initiative.

"It's so great to see philanthropy starting at such a young age. Children are truly inspirational and a living statement that anyone can help to make a difference."

CHRISTIE S. TRAPP | EXECUTIVE DIRECTOR



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# GIVING STARTS ... With a Dedicated Team

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.

MARY G. OLIVER, PRESIDENT **STEVE LOVE**, VICE PRESIDENT KIM MONTAG, TREASURER TERESA DOCKERY, SECRETARY **GERRY GERRON HEIDI GILDRED** AMY KELLEY REBECCA ZABEL JOHN BISHOP, MVMC **DOTTIE FOSSEL**, MVMC MANNY HOAG, MVMC

**CHRISTIE S. TRAPP** EXECUTIVE DIRECTOR

JENNIFER BARSNESS EXECUTIVE DIRECTOR ASSISTANT

#### **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 exceed the expectations of our donors and our community through diligent leadership and exemplary stewardship.

# GIVING STARTS... With Friends

Healthcare is central to the needs of everyone living in southwestern Montana and good quality healthcare is what the Madison Valley Medical Center works to ensure we all receive.

The Foundation is extremeport the efforts of the staff and physicians at Madison Valley Medical Center. Our task is to work with the community to support those projects that move healthcare forward. Over the past year our donors have provided critical support which includes a new equipment and comfort items for patients and their families.

We are so fortunate to have deeply caring and exceptionally skilled physicians, nurses, and support staff at the Medical Center who, along with many volunteers, help make the Medical Center the heart

of our community. Every day staff works together, improving and saving the lives of others, and occasionally supporting end of life with dignity. At some point each and every one of us will most likely be touched by this ly proud of it's mission to sup- Medical Center - many of us already have been. Thank you for sharing the responsibility to take care of our community today and for generations to come. Giving, as we all know, is never about the size of the gift, but rather the thoughts and emotions that accompany it.

With that in mind, the emergency helipad, diagnostic Board of Directors and Foundation Staff thank everyone who donated so generously this past fiscal year. Your investment ensures that the best professionals, healthcare technology, medical services and genuine care are available for us all when we need it most.

WITH SINCERE APPRECIATION.



MARY G. OLIVER | PRESIDENT Madison Valley Medical Center Foundation Board of Directors

Senior Vice President/ First Madison Valley Bank



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

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#### STATEMENT OF FINANCIAL POSITION

Madison Valley Medical Center Foundation's philanthropic activities resulted in the following financial summary for fiscal year 2013 (October 1, 2012 – September 30, 2013).

#### ASSETS

#### **CURRENT ASSETS**

Cash and cash equivalents \$341,039
Pledge receivables - current portion \$36,810

TOTAL CURRENT ASSETS \$377,849

#### CAPITAL ASSETS

Equipment and furniture, net \$1,377
Software, net \$5,350
TOTAL CAPITAL ASSETS \$6,727

#### OTHER ASSETS

TOTAL ASSETS	\$608,029
Total other assets	\$223,453
Assets held for sale	\$3,810
Pledges receivable	\$20,000
Investments	\$199,643
OTHER ASSETS	

#### LIABILITIES & NET ASSETS

#### LIABILITIES

Accounts payable \$226
Payroll liabilities \$1,602
TOTAL CURRENT LIABILITIES \$1,828

#### **NET ASSETS**

Designated for brick memorial \$705

Designated for signage \$17,957

Designated for Foundaton operations \$200,000

Undesignated \$340,704

Temporarily restricted \$46,835

TOTAL NET ASSETS \$606,201

# \$340,631

TOTAL FUNDS RAISED BY THE MADISON VALLEY MEDICAL CENTER FOUNDATION

FUNDS DONATED TO MADISON VALLEY MEDICAL CENTER

\$8,250

17,000 LAB

NUMBER OF GIFTS PROVIDED TO THE FOUNDATION

TREATED IN EMERGENCY

1,800

TREATED IN PHYSICAL THERAPY

INCREDIBLE MEDICAL CENTER

# 1 INCREDIBLE COMMUNITY

,600 IMAGING STUDIES (X-RAY, CT, MRI, ULTRASOUND, BONE DENSITY)

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#### 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. 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

# 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 \$340,000 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 replacement portable X-ray
- Purchase window tinting for physical therapy
- Establish pediatric exam room and upgrade clinic waiting room area
- Purchase 3 TV's for inpatient rooms
- Purchase CT equipment
- Build a helipad
- Landscape the helipad area
- Purchase Emergency entrance signage
- Purchase inflatable heart for community Health Fair

# GIVING STARTS... With Partners in Caring

The following major benefactors in fiscal year 2013 (October 1, 2012 through September 30, 2013) have reached an overall total giving level of \$10,000 or greater to the Madison Valley Medical Center Foundation.

Gerry and Sarah Gerron
Rick Greenreich and Ida Hemingway
Jan Janura and Carol Anderson
Otter Cove Peter Read
Pam Rentschler
Dr. Howard and Brenda Sheridan
Leroy and Jean Thom
Tim and Denise Weglicki
Anonymous Donor



FEATURED PARTNERS IN CARING
GERRY AND SARAH GERRON

# PHILANTHROPY MEANS MANY THINGS TO THE GERRON'S.

It means that we have done well in our personal and business lives and that we can share our good fortunes. It means that we can express our gratitude for our ability to help. Most importantly, philanthropy gives us the power to make meaningful differences in people's lives and our community. Sometimes that difference actually means saving lives.

Before we moved to the beautiful Madison Valley and settled in Ennis, we spent most of our years in Seattle. As our resources there continued to grow, so did our involvement in a number of key philanthropies. The love of humanity gave us very clear perspectives on our goal of helping our new Ennis community, neighbors, and friends. We made significant donations to the Ennis Library and Madison Valley Hospice as

well as numerous organizations throughout the Valley. We serve on several foundation boards and give our time and thoughts.

When we heard about the need for an emergency helipad, we didn't hesitate. The Ennis community needed it – the sooner the better. It made our community stronger and better prepared. Every time we see that chopper lift-off, we know we made the right decision. Every time we get a letter saying "you saved my life", we beam with gratitude. We are so fortunate to have the high quality staff and resources at the Madison Valley Medical Center, and we were truly honored for the opportunity to make it stronger for us all.

Please consider our journey, our experience, and the good people of the Madison Valley. Perhaps you may want to join that journey.

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#### OUR SUPPORTIVE COMMUNITY

Thank you to the individuals, companies and organizations that made 355 GIFTS during fiscal year 2013. 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, 2012 through September 30, 2013, 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)

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#### \$5.000 TO \$9.999

Anonymous Donor Fossel, Dottie Goldberg, Frederick and Lakewold, Carolyn MVMC Auxiliary O'Neel, Jack and Ginny Pruder, Donald K.

#### \$1,000 TO \$4,999

Atkinson, David and Patricia Barlow, John Beattie, Dick and Diana Berk, Dr. Leo and Marty Bowen, Don and Toni (Arrow Realty) Braxton, Terry and Karin Brennan, Mark and Dana Brown, Dr. Randolph and Marilyn Canter, Lisa Carpenter, Bill and Sylvia Clapp, David and Connie Cypress Healthcare, LLC Dale, John L. Dilschneider, Joe and Rikki Eaton, Lee and Connie Ennis True Value Hardware (In-Kind) Foil, Ron and Terry Going To The Sun Rally CSP Hale, David and Pat Harrison Elevator King, Luther and Teresa Laszlo, Andv and Paulette Solomon, Thomas and Kim Love, Steve and Diane (In-Kind) Taylor, James and Valerie Anne

Madison Valley Women's Club Miller, Ron and Judy Milner, Mike and Nina Moen, Marlene Montag, Jeff and Kim Nassetta, Mr. and Mrs. Paul Parish, Ed and Yvonne Phillips, Leland and Shelia Scudder, Donald and Martha Scully, John and Antoinette VanDerhyden, Richard D. Vidal, Torry and Frances Michael Wagner, Dr. John R. and Beverly

\$500 TO \$999 Arnold, Scott and Chris Barker, Brian and Sally Bing III, Alexander and Cynthia Brooks, Paul and Deborah Flannery Donich, Fred and Kitty Dougherty, Dorothy Executive Services (In-Kind) Griffin, Tom and Mary Houseman, Don and Kathyrn Krokes, Larry and Diane Madison Valley Ranchlands Group McClellan, Anna Mercer, Bill and Quinn Diamond Morimoto, Dr. Allen Pollak, Mr. and Mrs. James M. Rosin, Carolyn Simpson, Allan and Virginia

Terry, Michael and Mary Wyler, Don

#### \$499 & UNDER

Anderson, Todd and Olivia

American College of Cardiology

Allende, JJ and Megan

Anonymous Donor Argo, Shannon T. Bahnson, Steve Baker, Daniel and Kimberly Barnett, Vurnie Kaye Bauchman, Rick and Galen Bausch, David and Bonnie Beimel, George and Sibille Bell, Jackie Billings, James G. Bishop, Cyndee R. Bishop, John and Halsey Bohleen, Gene and Jan Coffman Bricker, David and Diane Brooks, Kathryn Browne, Tom Bullock, Larry and Gaylia Calkins, Robert and Kathy Cayting, Frank and Jeanette Chester, Trudy Christensen, Mr. and Mrs. Vern Clark, Gary and Bennie Clark, Mr. and Mrs. Edward Clausen, George and Mary Claypool, John and Diane (In-Kind) Clement, Walt and Alberta

Cleverley, Janice

Coffman, Ted Combs, Tim and Reinsch, Lea Anne Coor, William Scott and Debra Anne Costello, Fred and Ann Crennan, Martin and Marget Crown Fire Partners Inc. Crum, Dr. Paul Dale, John and Bridget Davies, Patricia Davies, Stanley and Gail Dente, Ronald and Gail Dewitt, Wayne and Amelia Diede, Florence Dochnahl, John and Janet Bean Doherty, Marianne Dougherty, Dorothy Duncan, Douglas and Mary Elliot, Steve and Marthe Endecott, Bob and Janet Engebretson, James and Benjie England, Charles English, Ronald and Jeanne Ennis RV Village Evans, Cherryl Evans, Lee and Cherryl Everts, James and Janice Fadal, Mike and Debbie Filby, Dr. Evan and Caroline Frey, Jim and Judie Garcia, Jim and Cheryl Garrett, Steve and Nanci Gaughran, George and Kathleen Gieck, Joe and Sally Gleason, Larry and Ruby

Goggins, Bob and Cora Goltz, Howard and Mary Grabley, Ray and Pat Hanas Gramza, Joanne Green, Ronald Grobe, Roger and Peggy Gunn, John and Susan Gurnett, Lauri Gwin, Curtis and Rita Haak, Ruth Haigh, June and Violet Happel, Dan and Lawrence, Ingrid Hardy, Jeanne Hartman, Art and Jeanne Hauck, John and Kris Heese, Paul and Lorriane Henderson, Shirley Hoag, David and Martha Hoag, Mansfield and Barbara Hocking, Rex and Penny Hodge, Richard and Lynne Horner, Eddie and Dolly Hudson, Larry and Diana Hunter, Harold and Judy Hutton, William and Lynda Imery's Talc Jackson, Micky and Judy Jarrett, David C. Johnson, Michael and Barbara Johnson, Ray and Theresa Jones, Dr. William and Rachel K&L Mortuaries Inc. Kahn, Timothy and Frances

Glines, Daniel and Barbara

Kelley, Scott and Amy Kent, Jack and Marjorie Kent, Neil Klatt, Lester and Bobby Knutson, Tony and Carol Kreider, Robert and Sue LaBar, Ruth Lamb-Mechanick, Deborah Landwehr, Peter and Connie Laszlo, Anne Laszlo, Jeffrey Leech, Jerry A. Legg, William Legler, John and Avis Lenz, Tony J. Leslie, Dr. Hugh and Mildred Arlene LeSuer, Bob Love, Marvin and Terry Luckey, Stephen and Jeannie Luebke, Dr. Robert and Nani Lynes, Robert and Sandra Magnante, Mary Anna Maloney, Mark and Jo Ann Marks, Robert and Barbara McDonlad, Mabel M. Milford, Richard and Lorrie Milner, Barry and Celia Misero, Joseph and Julia Mitchell, Tom and Paula Montana Anglers Hideaway Montana FWP Foundation

Morgan, Harold and Rodney Morningstar, Leslie Mountain View TV and Satellite, Inc. Northway, Jack and Kathyrn Novikoff, Harold and Amy Oakley, Cledith and Dinah Orr, Wes and Diane Papike, Rebecca Parsons, Ben and Hunter, Georgia Petroni, Mr. and Mrs. Mark Pfau. Ron and Sandi Povah, Patrick and Ginger Powell, Bill and Donita (In-Kind) Prindle, Austin and Maiorie Rathie, Mildred Reilly, Dennis and Stephanie Reynolds, Jack Rice, Bonnie Richards, Bruce and Suz Richardson, Harold Roberts, Chuck and Bonnie Robinson, Albert Rochez, Fred and Darlene Rockne, Klarence R. Rodorigo, Mark Ross, Bob and Shirley Russell, Ronald and Kathleen Rybak, Warren and Sally Rybus, Jane Schauwecker, Thomas Shanks, Robert Montana Game Warden Association Shanna Mae Photography (In-Kind) Sherick, Stephan and Doris Montgomery, Sidney and Gloria Sigman, Gary and Judith Moran, Don and Bonnie

Slaton, Bill and Kent Newton Smith, Lloyd Jr. and Janet Spann, Jim and Jane Sparkman, Mrs. Ben Stilwell, Thomas and Deanna Stockman Bank Stonebraker, Judi Strickland, Ray and Linda Swanson, Mr. and Mrs. Sherwood Taylor, Gurney and Peggy Thallmayer, Hans and Josie Trapp, Eric and Christie Tucker, The Honorable Mr. Loren and Mrs. MarvAnn Van Der Have, John and Eve Vujovich, Josh and Becky Walker, Tom Wallop, Victoria Walser, Lee Walsh. Lois White, Drs. Mike and Eileen Whitman, John and Beverly Willis, John and Polly Witt, William and Janice Wood, Dick and Mary Woods, James and Anna Wright, Dick and Vivian Ziegler, Jack

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#### CORNERSTONE CLUB

The Cornerstone Club is the Foundation's foremost philanthropic recognition group. Through the Cornerstone Club, 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**

\* indicates - Founding Member
Kathyrn Brooks\*
Bill and Sylvia Carpenter
Fred and Kitty Donich
John and Janet Duncan\*
Mansfield and Barbara Hoag
Anna McClellan\*
Richard and Lorrie Milford

Marlene Moen\*

Ron and Sandi Pfau

Harold Richardson\*

Sonny and Janet Smith\*

#### GIFTS IN HONOR & 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.

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#### **GIFTS IN HONOR OF**

Carol Anderson
Dr. David Ban
Jay and Leesa Bingham
Dr. Gina Bowers

Donna Brown

Dr. Paul Buse

Bob and Dallas Celecia Christopher DiMichele

John and Robert Hartman Dr. John Hess

Dr. Brad Kessler

Dr. John Laird

Dr. R.D. Marks and Lisa DeGroot

Jeff and Kim Montag

Ann Restvedt
David and Barbara Robinson

James Rowan
John and Antoinette Scully
Dr. Brad White
Dr. Jeffrey Zuke

#### **MEMORIAL GIFTS**

George Alger
Doris "Dode" Barnett
John Branger
Bob Bullock
John Clark
Bob Cleverley
Peter T. Combs
John and Bonnie Cox
James Davies
Lenore Fasules
Richard E. Henderson

Fredrick LaBar
Bob Lake
Janet R. Manley
Roy Moen Jr.
Charles Pierce
Pat Shields Ramey
John Paul Reilly, Lt. Col. USMC
Fred Rentschler
Bonnie Rice
Mary Woodrow Rockwell
James Harrison Saunders
Jan Smith
Dale Trapp
Gene Warburton

Monty D. Jackson

Larry Zabel

### GIVING STARTS ... With Commitment to the Cause

Some of the original look of the Madison Valley Medical Center Auxiliary still prevails and is respected and revered but the days of raising money simply for linens are over. Volunteers no longer just knit (although the knitting that is still done is truly valued and needed); they help in many different ways.

The Auxiliary has evolved and now operates a business that enables them to help purchase medical equipment. Their operation generates revenue in the thousands of dollars each year. They are Project Managers who have given countless hours of time toward a variety of

projects, with the most prolific being the Annual Home Tour. They are people who have the knowledge and skills to purchase and manage inventory, arrange flowers, merchandise, market, take photos, operate software systems, and so much more.

Each year, the Auxiliary members volunteer a minimum of 4,700 hours in services to patients, visitors, vendors, blood drives, various receptions and miscellaneous tasks. Both the Foundation and the Medical Center are extremely grateful to the Auxiliary for their continuing support and dedication to the community.

#### MADISON VALLEY MEDICAL CENTER AUXILIARY MEMBERS

LORRIE MILFORD, PRESIDENT
Barbara Axberg
Jan Beekman
Sibille J. Beimel
Sandi Bourgeois
Diane Bricker
Kathryn Brooks
Janice Cleverley
Jeanne English
Dottie Fossel
Kay Frisbie
Mary Goltz
Jonn Gunn
Susan Gunn

Colleen Hill
Lynne Johnson
Sharon Lee Kilmer
Diane Krokes
Ruth LaBar
Nancy Leadbeater
Bonnie Matzick
Carol McMullin
Linda Miller
Susan Miller
Leah Miskol
Gloria Montgomery
Kris Ortega

Sandi Pfau

Suzanne Richards
Sheri Riggs
Miriam Rohrbaugh
Snaque Rollo
Carolyn Rosin
Kathleen Russell
Patricia Stabler
Judi Stonebraker
Melinda Tichenor
Sue Welna

Jane Rybus

Honorary Members
MaryLou Gillan

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The Madison Valley Medical Center

Soundation
"Supporting high quality health care with
modern services and aualified professionals"

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 2013 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 health-care to citizens of the Madison Valley and southwestern Montana. Visit www.mvmcf.org