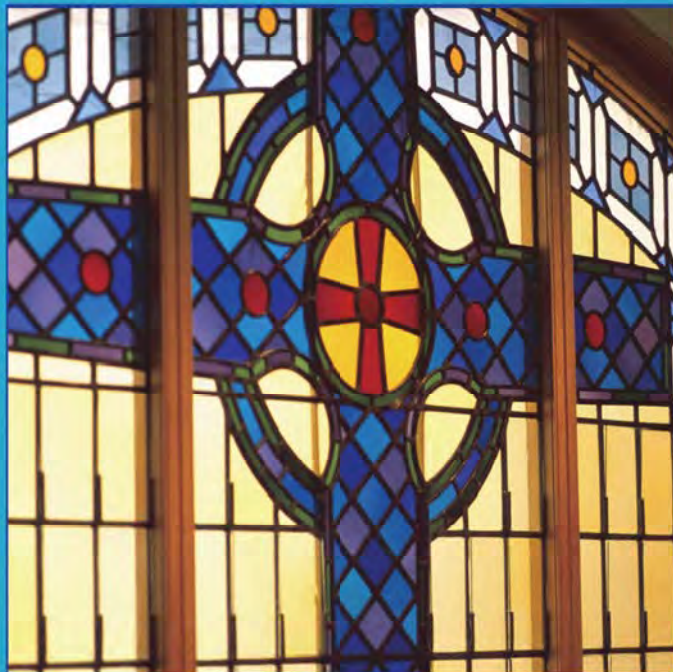




# 2020 Annual Report



## APPENDICES

Submitted to the  
Congregation for  
Institutes of  
Consecrated Life  
and Societies of  
Apostolic Life



**BON SECOURS  
MERCY MINISTRIES**

**BON SECOURS MERCY MINISTRIES**

1505 Marriottsville Road  
Marriottsville, MD 21104  
United States of America

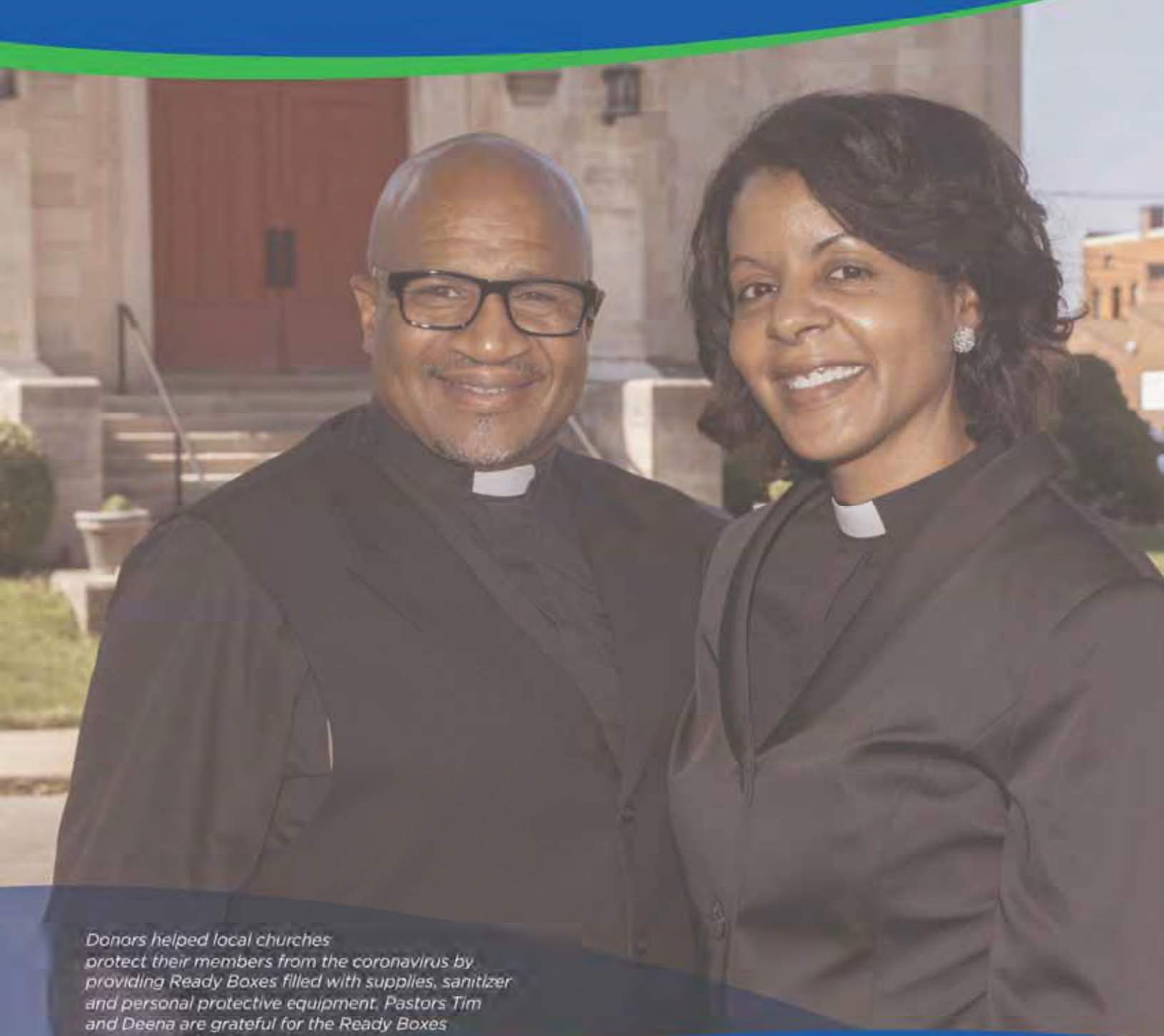
**Appendix C**  
2020 Foundation  
Impact & Scoreboard  
Report







# 2020 Foundation Impact & Scorecard Report



*Donors helped local churches protect their members from the coronavirus by providing Ready Boxes filled with supplies, sanitizer and personal protective equipment. Pastors Tim and Deena are grateful for the Ready Boxes they received from our Parish Nursing program.*

*Recognized as High Performer in Overall and Health System categories for net fundraising returns in top 75th percentile of U.S. and Canadian reporting organizations*





# From our Board Chair

**Dear board members, leaders and foundation team,**

I think we can all agree 2020 was a year we will never forget. We faced the unknown, navigated surges of COVID-19, and tried to protect ourselves and our loved ones from the virus. We gained a new appreciation for the simple joys of family, good health... and a well-stocked supermarket. For every moment of fear and heartache, though, the pandemic also inspired bravery, compassion, human connection and generosity.

When our communities and our health system's patients needed help the most, donors responded in awe-inspiring ways!

Early in the year our Foundation faced uncertainty. Fundraising events were cancelled, donors couldn't meet face to face, projects for which we were fundraising were paused, and the economy was unpredictable. Adding to the challenges, a third of our Foundation staff was furloughed for three months, everyone is still working remotely and virtual meetings replaced in-person gatherings. And in June, the Ashland foundation was divested, with their assets transferring to a new community entity.

Especially in the face of so much adversity, I'm exceedingly proud of the way we pivoted quickly to adjust fundraising efforts by focusing on grants and annual giving to offset a dip in major giving and event revenue. We quickly found virtual ways to stay connected with donors and stepped up to meet the unprecedented needs of our hospitals, communities and BSMH associates.

As furloughs became necessary across the ministry, the BSMH Foundation board quickly approved up to \$60 million in funding for the Associate Hardship Fund to help offset the loss of wages for all of our affected associates and to cover costs of childcare or eldercare for essential frontline staff to continue working. Our Foundation ultimately provided over \$42 million to assist associates, without diverting any donor gifts from our foundation efforts. In addition, many of our market Foundations allocated funds to help with local needs like PPE, equipment, COVID testing, hotel stays for frontline workers, and special comforts for weary staff.

While all this extraordinary work was taking place, Bon Secours Mercy Health also launched Now Near Far to design and build for the future of the ministry and our Foundation. More details about the Foundation's ROI-focused initiatives are available in this report.

When we merged in 2019, we committed to focus on board member experience and engagement. This year, we expanded the board with a focus on geographical representation, diversity, and talent. Our second annual Chairs Council forum helped to better coordinate and support fundraising efforts in all our BSMH markets. And we continue to expand and develop our operating committees so that board and staff talent can be better leveraged in our work beyond the board room.

2020 was anything but a "normal" year. Despite all the challenges and uncertainty, our donors were more generous than ever and contributed in excess of \$68.3 million—a 3.1% increase from 2019. Most important, our donors saved lives and impacted the health of countless people at a time in which great health care is more important than ever.

I am deeply grateful for every donor, board member, leader and Foundation teammate. You make a difference!

Wishing you and yours good health in this new year,

**John Harris, III**

*Chair, Bon Secours Mercy Health Foundation Board of Directors*

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# BON SECOURS MERCY HEALTH Foundation

**14** Foundation offices  
in **6** states serving over **50** hospitals  
and **1,200** sites of care

### Florida

- St. Petersburg

### Kentucky

- Irvine
- Paducah

### Maryland

- Baltimore

### Ohio

- Cincinnati
- Lima
- Lorain
- Springfield
- Toledo
- Youngstown

### South Carolina

- Charleston
- Greenville

### Virginia

- Hampton Roads
- Richmond

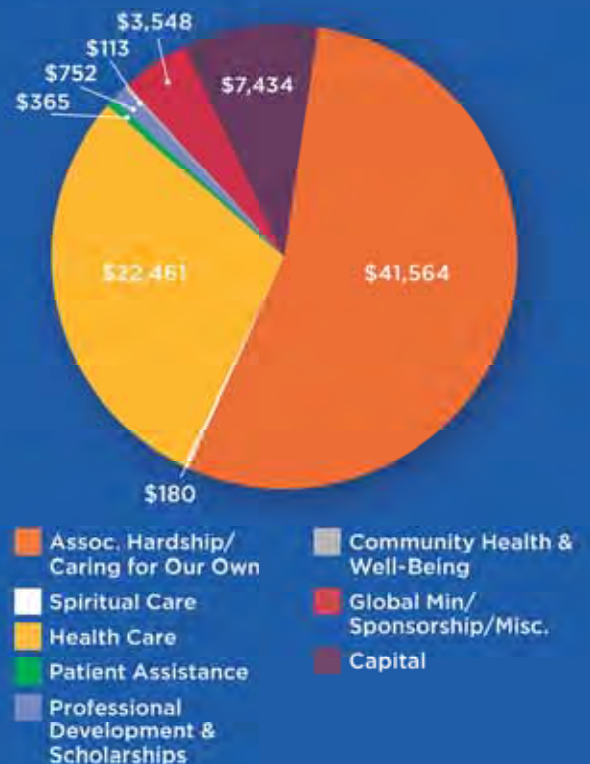


## 2020 HIGHLIGHTS & ACHIEVEMENTS

- Provided \$41.5 million of \$60 million committed to Associate Hardship Fund that assisted associates through the pandemic.
- Raised \$68.34 million, exceeding last year's revenue total of \$66.29 million by 3.1%.
- For every dollar of operating costs, our efforts generated \$4.49 in revenue. This translates to only \$0.22 of expense for every dollar raised, indicating strong revenue and efficient deployment of resources.
- Provided \$76.42 million in philanthropic support to the ministry, with an added \$30.3 million in grants awarded for additional ministry support.
- Earned AHP High Performer designation in both Overall and Health System categories.
- Implemented a unique program to make thank you calls to all new donors (1,108 calls made).
- \$900,000 raised from direct response appeals for COVID relief and Associate Hardship Fund.
- Raised over \$2.66 million in commitments from BSMH associates, including more than \$1.59 million committed during Give for Good campaign in September.
- Launched social media strategy on new Foundation Facebook pages for broader awareness.
- Consolidated Raiser's Edge databases and launched Financial Edge software.

## Ministry Support

(US Dollars in 000's)



### 2021 Objectives

-  Raise **\$64.2 million**, significantly exceeding 2019-2021 **\$150 million** three-year Strategic Plan target (excluding Roper St. Francis)
-  Advance **Now Near Far** initiatives to increase high-ROI sources of revenue
-  Increase major and planned giving through staff training and consistent approaches
-  Launch new BSMH Foundation website and digital communications platform to support personalized giving experience for donors in all points of contact
-  Develop grateful patient program as part of continuum of care
-  Identify and assign new prospective donors to increase corporate and foundation giving
-  Integrate virtual reality and video resources into donor cultivation and communications
-  Increase grant awards for markets and streamline post-award management
-  Evaluate and improve return on investment of all events
-  Support board members to fully engage in all aspects of donor discovery, cultivation and solicitation



# Now Near Far

Progress of Foundation initiatives focused on growing revenue through high Return on Investment tactics

## Enhance individual major gifts and planned giving

- Hired an estate and planned giving professional to build a planned giving program, working \$1.1 million pipeline
- Developed coaching program and selected consultant to provide success training for gift officers
- Formed task force to create a major and planned giving playbook for gift officers
- Analyzed major gift prospects and gift officer portfolios to identify priority areas for major gift program
- Analyzed industry best practices for embedding grateful patient program in the continuum of care and began selection process for software vendor

## Enhance corporate and foundation giving

- Subscribed to a new foundation research product to identify prospects
- Expanded Mission Partners program by engaging market staff in targeting additional prospects
- Identified new prospects by analyzing previous corporate and foundation donors for reengagement

## Enhance digital communications and annual giving

- Selected vendor for new BSMH Foundation website and personalized giving experience
- Collaborated with Construction team to secure virtual reality resources, graphics and videos
- Launched quarterly appeals via mail, email, social media to enhance donor retention and acquisition
- Implemented Luminate Online for email communications and online giving

## Enhance grant awards

- Developed new market opportunities and collaborations (under CARES Act funding)
- Created job description for post award management position
- Identified post award elements and resources among other departments

## Reduce costs and improve event ROI

- Analyzed historical events for profitability and engagement value
- Merged donor databases to simplify processes and increase speed of delivery



# Foundation Impact Report

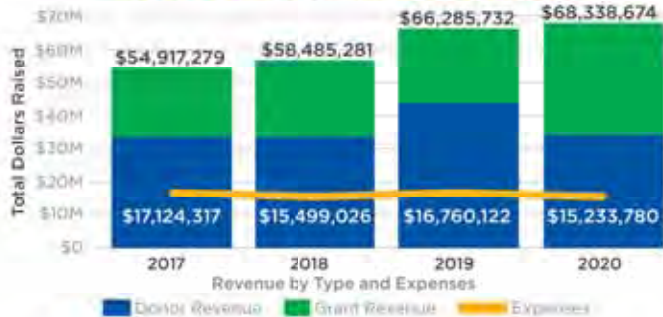
## CONSOLIDATED RESULTS & MARKET PERFORMANCE



**Target: Raise \$60.4 million in 2020 toward cumulative \$150 million 2021 goal**

Strategic plan goal - 2020: \$50 million  
Stretch goal - 2020: \$60.4 million

### TOTAL DOLLARS RAISED & EXPENSES



\*Results include grants awarded and Ashland (divested June 30)



**Target: \$0.29 cost to raise a dollar in 2020 toward \$0.30 goal by 2021**

Strategic plan goal - 2020: \$0.31  
Stretch goal - 2020: \$0.29

### ROI AND COST TO RAISE A DOLLAR



\*Results include all costs; AHP standard measures only direct fundraising costs



TOTAL DOLLARS RAISED	GOAL	2020	% of Goal
<b>BSMH Foundation (\$52.1)</b>	<b>\$60.41</b>	<b>\$68.34</b>	<b>113.1%</b>
Baltimore	\$3.50	\$7.97	227.6%
Charleston	\$6.79	\$7.77	114.4%
Cincinnati	\$4.00	\$3.74	93.5%
Greenville	\$4.00	\$5.92	148%
Hampton Roads	\$1.50	\$1.58	105.3%
Irvine	\$0.80	\$0.31	39.1%
Lima	\$2.00	\$1.56	77.8%
Lorain	\$3.00	\$1.81	60.3%
Paducah	\$1.05	\$1.49	141.9%
Richmond	\$6.70	\$5.69	84.9%
Springfield	\$1.47	\$2.66	181.0%
St. Petersburg	\$0.20	\$0.13	64.1%
Toledo	\$9.00	\$12.31	136.8%
Youngstown	\$6.40	\$6.10	95.2%
Home Office	\$9.50	\$9.21	97%

PROGRESS KEY: = ≥ 100% = 91.6%-99.9% = < 91.5%

COST TO RAISE A DOLLAR	CTRD GOAL	CTRD 2020
<b>BSMH Foundation Total:</b>	<b>\$0.29</b>	<b>\$0.22</b>
Baltimore	\$0.16	\$0.07
Charleston	\$0.28	\$0.27
Cincinnati	\$0.30	\$0.18
Greenville	\$0.15	\$0.07
Hampton Roads	\$0.50	\$0.24
Irvine	\$0.00	\$0.02
Lima	\$0.22	\$0.22
Lorain	\$0.29	\$0.35
Paducah	\$0.40	\$0.17
Richmond	\$0.34	\$0.25
Springfield	\$0.36	\$0.12
St. Petersburg	\$0.08	\$0.01
Toledo	\$0.21	\$0.06
Youngstown	\$0.22	\$0.16
Home Office	\$0.50	\$0.69

PROGRESS KEY: = At budget or below = Above budget



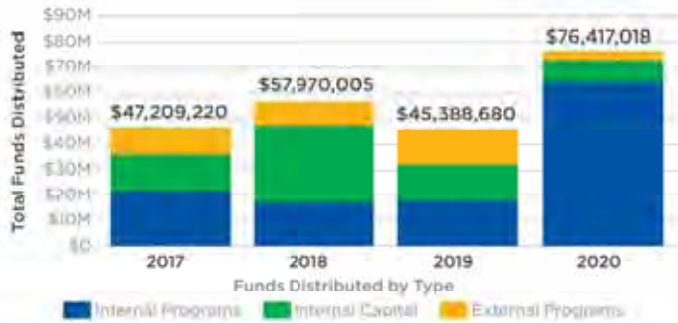


**Target:** In 2020, provide \$36.25 million in fund distributions to or on behalf of Bon Secours Mercy Health toward \$90 million 2021 goal



**Target:** 100% Foundation board giving participation

### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



\*Does not include additional grant support to the ministry

### BOARD GIVING PARTICIPATION



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)	GOAL	2020	% of Goal Reached	
<b>BSMH Foundation Total:</b>	<b>\$36.25</b>	<b>\$76.42</b>	<b>210.8%</b>	
Baltimore	\$2.10	\$3.94	187.7%	
Charleston	\$4.07	\$4.38	107.4%	
Cincinnati	\$2.40	\$2.22	92.7%	
Greenville	\$2.40	\$1.07	44.6%	
Hampton Roads	\$0.90	\$0.24	26.2%	
Irvine	\$0.48	\$0.01	1.4%	
Lima	\$1.20	\$0.40	33.7%	
Lorain	\$1.80	\$1.23	68.6%	
Paducah	\$0.63	\$0.61	97.1%	
Richmond	\$4.02	\$2.19	54.4%	
Springfield	\$0.88	\$0.90	101.9%	
St. Petersburg	\$0.12	\$0.03	22.6%	
Toledo	\$5.40	\$6.41	118.7%	
Youngstown	\$3.84	\$5.84	152.2%	
Home Office	\$5.70	\$46.84	821.8%	

PROGRESS KEY: = >100% = 91.6% - 99.9% = <91.5%

BOARD GIVING	Foundation Board		Market Board		
	GOAL	2020	GOAL	2019	
<b>BSMH Foundation Total:</b>	<b>100%</b>	<b>98.3%</b>	<b>100%</b>	<b>95.3%</b>	
Baltimore		83.3%		100.0%	
Charleston		96.4%		90.9%	
Cincinnati		100.0%		100.0%	
Greenville		100.0%		85.7%	
Hampton Roads		91.3%		84.6%	
Irvine		100.0%		100.0%	
Lima		100.0%		93.3%	
Lorain		100.0%		94.1%	
Paducah		100.0%		100.0%	
Richmond		100.0%		100.0%	
Springfield		100.0%		93.3%	
St. Petersburg		N/A		100.0%	
Toledo		100.0%		91.7%	
Youngstown		100.0%		100.0%	
Home Office		100.0%		95.0%	

PROGRESS KEY: = >100% = 91.6% - 99.9% = <91.5%



# Foundation Impact Report

## FINANCIAL OVERVIEW

### Operating Performance YTD December 2020 (unaudited)

U.S. dollars in thousands

	ACTUAL	BUDGET	VARIANCE	PRIOR YEAR
<b>NEW REVENUE RAISED</b>	<b>\$68,339</b>	<b>\$60,410</b>	<b>\$7,929</b>	<b>\$66,286</b>
<b>Operating Expenses</b>				
Employment Expenses	\$11,892	\$13,594	\$1,702	\$11,856
Purchased Services	\$1,851	\$2,354	\$503	\$2,190
Supplies, Utilities, Travel, Other	\$710	\$965	\$255	\$1,166
Miscellaneous	\$781	\$813	\$32	\$1,548
<b>Total Operating Expenses</b>	<b>\$15,234</b>	<b>\$17,726</b>	<b>\$2,492</b>	<b>\$16,760</b>
<b>Cost to Raise a Dollar</b>	<b>\$0.223</b>	<b>\$0.293</b>		<b>\$0.253</b>
<b>Ministry Support</b>	<b>\$76,417</b>	<b>\$36,246</b>	<b>\$40,171</b>	<b>\$45,389</b>

\*Includes Roper St. Francis Foundation

## Consolidated Balance Sheet December 2020 (unaudited)

U.S. dollars in thousands

ASSETS	
<b>Current Assets</b>	
Cash and Cash Equivalents	\$18,629
Other Receivables	\$4,721
Prepaid Expense and Other Current Assets	\$617
<b>Total Current Assets</b>	<b>\$23,967</b>
Investments	\$339,083
Property and Equipment - Net	\$598
Other Assets	\$7,079
<b>Total Assets</b>	<b>\$370,727</b>

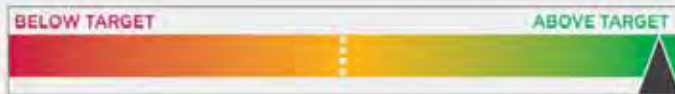
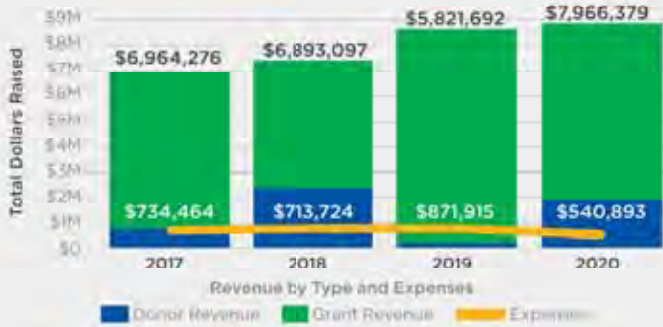
LIABILITIES AND FUND BALANCE	
<b>Current Liabilities</b>	
Accounts Payable	\$9,449
Other Current Liabilities	\$578
Other Long-term Liabilities	\$6,435
<b>Total Liabilities</b>	<b>\$16,462</b>
<b>Net Assets</b>	
Without Donor Restrictions	\$173,292
With Donor Restrictions	\$180,974
<b>Total Net Assets</b>	<b>\$354,266</b>
<b>Total Liabilities and Net Assets</b>	<b>\$370,727</b>

\*Excludes Roper St. Francis Foundation

# Foundation Impact Report

## BALTIMORE

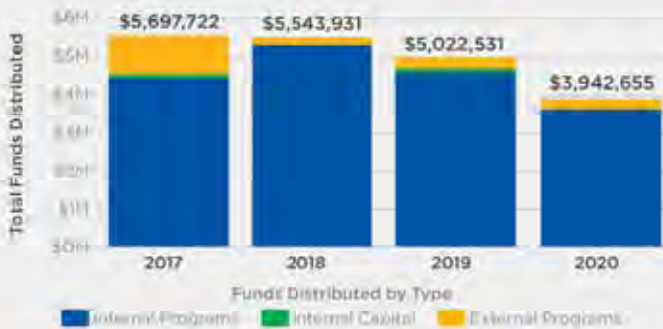
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





## Trakiesha is able to live her dreams **thanks to you**

As a young girl in West Baltimore, **Trakiesha Peels** grew up taking care of others. It wasn't a hardship for her to cook, clean or comfort her aging grandparents as they got sick.

"That may not sound like fun to you, but that's because you didn't know my grandparents," Trakiesha says with a smile.

With her nurturing instincts on display from the start, Trakiesha found an answer to her desire to help those in need when she discovered a nurse training program at Bon Secours.

As a young mom of three, Trakiesha knew the classes wouldn't be easy, but she knew it would be worth it to gain time with her children.

"I thought, if I could complete the training and get a nurse's assistant job, I bet that would pay a high enough salary where I could cut back to just working the one job and I'd get to be doing the kind of career I dreamed

about—helping people in a meaningful way."

Gifts to Bon Secours provided this educational opportunity without the traditional prerequisites. Trakiesha is grateful for this donor-supported program and knows it's just the start to her story as a nurse.

"I want my kids to know the sky is the limit, but even then, never stop reaching," says Trakiesha.

**Your support of Bon Secours gave Trakiesha important educational opportunities. Now as a CNA, Trakiesha is dreaming even bigger to become a registered nurse.**

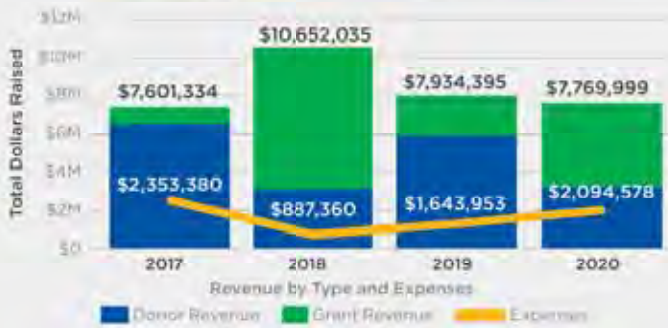
*Trakiesha Peels is grateful for donors like you who helped her complete a nurse training program at Bon Secours to become a Certified Nursing Assistant (CNA). She plans to continue her education to become a registered nurse.*



# Foundation Impact Report

## CHARLESTON

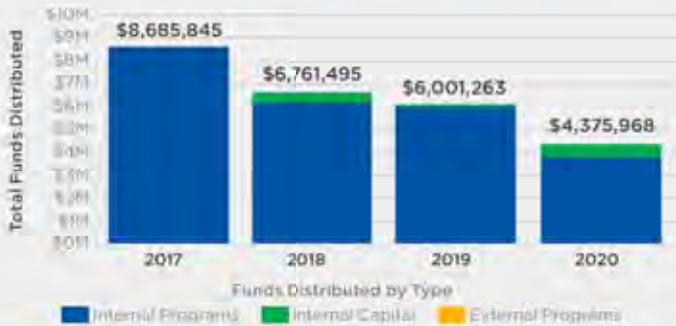
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION







## You helped Maria take care of her family during a desperate time

**Maria** was pregnant with her fourth child when the COVID pandemic hit the Lowcountry. Concerned that she was suffering from postpartum depression, Maria's OB/GYN referred her to a mental health professional at the Roper St. Francis Greer Transitions Clinic, a place for the under and uninsured to receive life changing health care with dignity.

As it turns out, Maria wasn't depressed. She was desperate.

While Maria is a citizen, her husband was here illegally. He was the only source of income for their family of six. But he had recently been deported, leaving Maria to care for her newborn and three older children alone.

*Maria had a newborn and three other children to care for when her husband was deported, leaving their family with no income. Thanks to donors like you, Maria got emotional and financial support through the Greer Transitions Clinic.*

Because of donors like you who generously support the Greer Transitions Clinic, Maria got the help she needed to take care of her family. She was enrolled in counseling and our Community Health Advocates immediately went to work to find resources for Maria and her children.

Your donations mean Maria got housing for her family and supplies, food and medications for her and her children. She even got her water bill covered, and our social worker helped her apply for the assistance programs she desperately needs for long-term support.

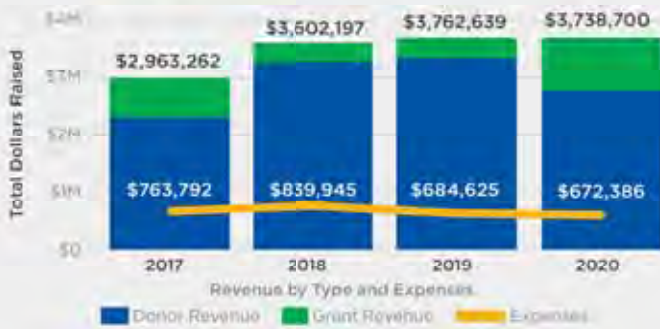
**Thanks to you, Maria is doing much better, has had no return visits to the hospital and has the social services in place to help her succeed and care for her family.**



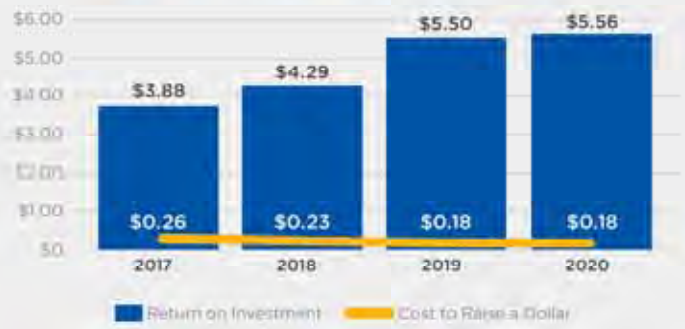
# Foundation Impact Report

## CINCINNATI

### TOTAL DOLLARS RAISED & EXPENSES



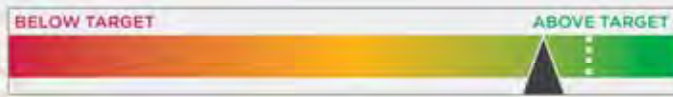
### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





*Susan Jones Satterwhite is grateful for your help when cancer challenged both her health and her finances.*

## Your gift helped Susan when she was fighting breast cancer

Before being diagnosed with breast cancer, **Susan Jones Satterwhite** had no idea how expensive an illness like that could be.

She had insurance, but because she couldn't work during the radiation, chemotherapy and surgery she received at Mercy Health —Fairfield Hospital, Susan started falling behind on her bills including utilities and her mortgage. And then there were co-pays and deductibles adding up as well.

But you were there for her. Because of your gift, Susan got the help she needed with her bills, including food and gas to get to her appointments. She was able to focus on the most important thing—getting well.

"I'll admit, before I got sick I wasn't sure if donations were making it to the places most needed," Susan said. "But now I can assure you they do."

**"Without all of the help I received I'd probably be on the streets. The donations you are making are helping real people with real needs."**

Susan knows first-hand how important your contributions are, and she is eternally grateful.

"Without all that assistance, I don't know what I would have done," she said. "I just want donors to know this really helps. Without them, a lot of people wouldn't even be here because they wouldn't be able to afford the treatments. I was lucky because I have insurance.

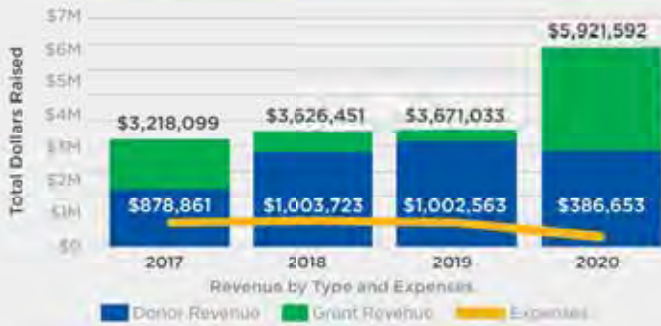
"I'm so happy there are people in the world who can make those contributions," Susan said. "I want donors to know that I thank them from the bottom of my heart. I appreciate them so much."



# Foundation Impact Report

## GREENVILLE

### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





## You saved Sandra's life by helping her get the mammogram that found her breast cancer

When **Sandra Aveiro** saw the sunbeam shining on the bright pink bus, she felt it was a sign.

"It was a gloomy day," Sandra recalled. "But it when the sun hit that bus, it was glowing, and I just felt like it was calling to me to go in."

She was running errands with her mother-in-law when they saw the Bon Secours Mobile Mammography Coach, and at the other woman's insistence, they both went in for a routine mammogram. What 39-year-old Sandra didn't expect was the breast cancer diagnosis she was about to receive.

"I was really nervous," she said. "Not only because I didn't know what the outcome of the screening would be, but also because I didn't have insurance and wasn't sure how I could pay for it. It was such a relief when they let me know that I qualified for a grant that would cover the costs."

Your generous gift for the Mobile Mammography Coach and for the grants that assist low-income patients to receive screenings, helped save Sandra's life.

Sandra's follow-up tests confirmed that she would need a mastectomy, chemotherapy, and radiation treatments. But because her cancer was detected early, she is now cancer free and back to taking care of her husband and four sons.

**"Thank you, thank you, thank you! It is such a blessing that donors are helping people like me. I wouldn't have been able to do it without that kind of help. It's God's work they are doing."**

*Sandra Aveiro was relieved to get help with the cost of her mammogram on the Mobile Mammography Coach. She's grateful for your support of a program that likely saved her life.*



# Foundation Impact Report

## HAMPTON ROADS

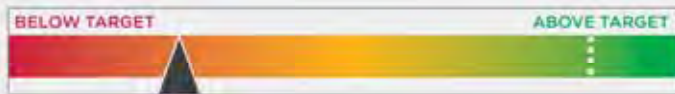
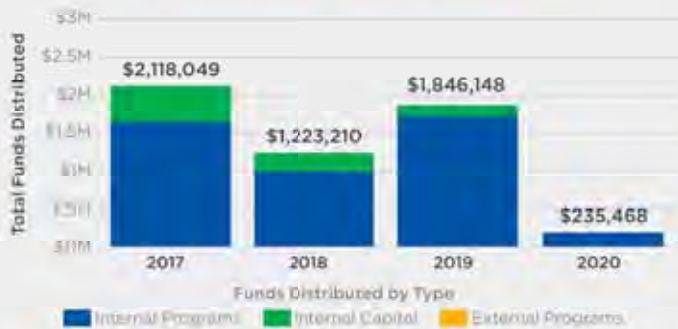
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION







*Your gift to Bon Secours Family Focus meant Andrea and her family got help with community resources and parenting education when they were new to the area.*

## Andrea's family is healthier and stronger **because of you**

Family is everything to **Andrea Pegues**. And Andrea can't imagine life without help from Bon Secours Family Focus. Because of you, Andrea gets the support, education and access to community resources she needs to successfully raise their children.

"With all the programs they offer, they have helped me and my children be more social and make new friends," she said. "It gave all of my children a safe space to play and learn independence, which made starting school so much easier. And it taught us a healthier lifestyle. We even started our first garden, which has helped me lose 20 pounds."

For parents and children alike, Bon Secours Family Focus provides programs that cover parenting and nurturing kids of all ages, from newborns to teens. Thanks to your gift, parents get health and safety

education to help them take a more active role in raising their children.

"Family Focus is a saving grace for many of the families that we serve," said a Family Focus program manager. "It is a blessing to be able to nurture parents when they're feeling overwhelmed and challenged."

Your donations directly impact families in need, helping them become healthier in mind, body and spirit. Andrea feels that your support helped her become a better mother.

**"They provided support for me and my children when we had no family in the state. It is so wonderful to know there are programs like this out there that can help families be better, and to know that you're not alone."**



# Foundation Impact Report

## IRVINE

### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION



## You helped **Sammy** recover from an ATV accident

**Sammy Hatton's** day was going pretty well. He had just shot a 10-point deer and was heading home with it on his ATV, but it was getting dark, cold, and rainy. That's when things went terribly wrong.

Sammy hit a tree in the growing darkness, and his ATV rolled over on him three times. Dazed, he started walking—in the wrong direction. Dressed in just pants and a sweatshirt, he soon was lost, drenched, and the rain was turning to snow. Luckily, he had his phone and was able to contact a friend who sent a rescue crew to find him.

Thanks to your support of Mercy Health — Marcum and Wallace Hospital, the emergency department team was ready and waiting for him with warmed IV fluids and donor funded equipment that provided heated blankets.

"Turns out I had two head concussions, four cracked ribs, a dislocated shoulder, and the impact of the ATV on my chest knocked my heart out of rhythm," Sammy

said. "I was shaking, freezing, and soaking wet—probably going into hypothermia. It was frightening. If it hadn't been for the care team, the IVs and blankets, I don't know that I would have made it."

Sammy is very grateful for your contributions to the hospital.

"I thank God every day that the hospital took such good care of me," he said. "It felt so good to feel safe and have those blankets on me."

**"I appreciate the hospital and the donors so much. If I could, I would hug every donor and thank them every day!"**

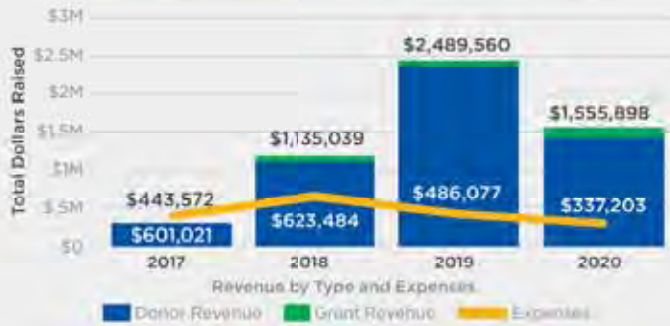
*Sammy Hatton feels lucky to be alive after an ATV accident one cold, snowy afternoon. He credits donors like you and the Emergency Department team at Mercy Health — Marcum and Wallace Hospital for providing everything he needed to recover from his injuries.*



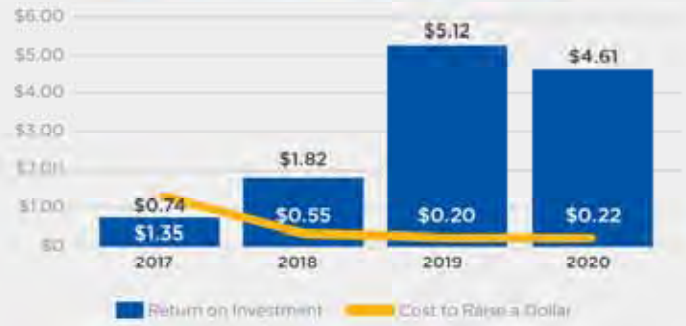
# Foundation Impact Report

## LIMA

### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION







## You're helping Dr. Shakeel get hands-on crisis training in her graduate medical education program

When **Dr. Sana Shakeel** came to Lima to attend the Graduate Medical Education (GME) Program at Mercy Health — St. Rita's, she never thought she would get the first-hand experience in how to handle a pandemic.

But with the outbreak of COVID-19, she is learning a whole new skill set. She and her fellow residents are getting to see how the health system manages such a crisis and have been able to participate in how emergency protocols are created during times like this.

Because of your support for the GME program, Dr. Shakeel and other new physicians get experience working in a community hospital setting, with all of the resources available at larger institutions.

"I certainly want to thank donors who support the GME program," Dr. Shakeel said. "I get so much hands-on

*Because of your gift for the Graduate Medical Education Program at Mercy Health – St. Rita's, Dr. Sana Shakeel is getting real-life experience in managing a pandemic like COVID-19. Dr. Shakeel says the GME program provides exceptional training and attracts talented doctors to Lima.*

experience working one-on-one with attending physicians. I'm able to perform procedures, and I have had access to the resources I've needed.

While the residents are not directly caring for COVID-19 patients, we are experiencing how a pandemic looks. As a new physician, it is an important education for our future."

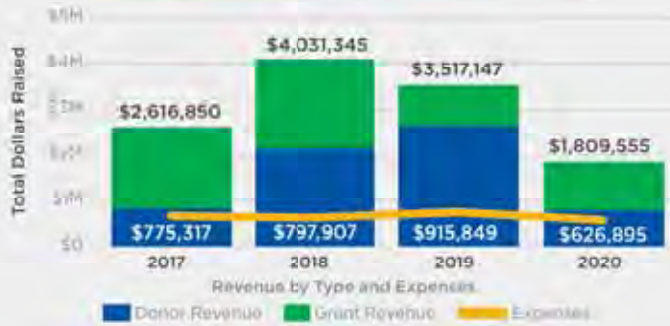
Dr. Shakeel also said she looks forward to the opening of the new building to house the GME program. "The new building with simulation and lecture rooms are going to attract more doctors to the community," she said. "I'm proud to say I'm working in a community hospital, and we don't lag behind big university hospitals."

**"I want donors to know that it is really adding value to our education and training."**

# Foundation Impact Report

## LORAIN

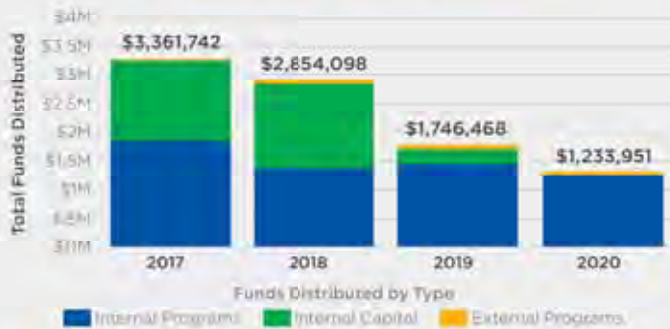
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





## You're helping protect Pastor Tim & Deena's congregation from COVID-19

**Pastor Tim Williams** remembers the "absolute best" care packages his mother would mail him while he was in college. He was flooded with emotion again when he recently received a Mercy Health Parish Nursing COVID-19 Ready Box for his church congregation.

Because of your gift for the Parish Nursing program, Mercy Health was able to send Ready Boxes to more than 90 local church congregations. The boxes were filled with hand sanitizers, disinfectants, thermometers, gloves, masks, face shields and tape measures.

**Tim and his wife/co-pastor, Deena, said the Ready Box had all the "right stuff" to help their Greater Victory Christian Ministries parishioners feel safe during the pandemic.**

COVID-19 has "intimately impacted" Tim, Deena and the members of their congregation. They have lost several members to the virus, including the founding member and patriarch of their church.

"It has hit us really hard," he shared. "We don't just see colors on the map. We see people that we love dearly."

Tim feels the Ready Box supplies have been key to reducing the risk for those in attendance as they have gathered to celebrate and mourn those lost.

"We have a lot of seniors that were concerned about meeting in person," he said. "These things in this package mitigate a lot of germs, and so we are very pleased. They are an amazing package, much more than we expected."

*Tim and Deena are pastors at Greater Victory Christian Ministries. Their congregation was one of over 90 local churches to receive a Ready Box from Mercy Health's Parish Nursing. The crate was filled with supplies and personal protective equipment to help protect their members from coronavirus.*





# Foundation Impact Report

## PADUCAH

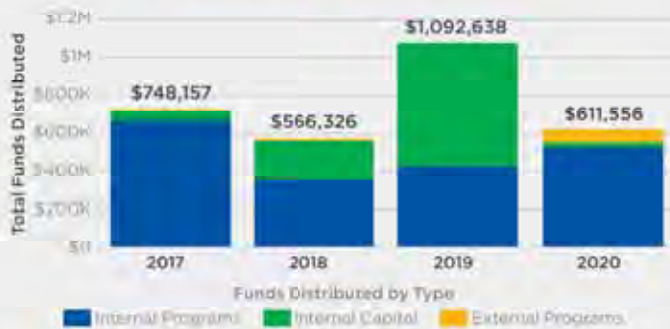
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





## You helped Gerald get the cancer treatment he needed

The last few years have been difficult for **Linda and Gerald Ballinger**, Mercy Health patients from Union City, Tennessee. In 2011, Gerald was diagnosed with Non-Hodgkin's lymphoma, and needed chemotherapy treatments to recover. Then in 2018, their son died from advanced pancreatic cancer. But they were really blindsided last year when Gerald was diagnosed with stage 3 lung cancer that would require 33 consecutive radiation treatments. Making matters worse, the treatment facility was an hour away from home, adding gasoline expenses to insurance copayments that were already breaking their budget.

Thanks to your donation to the Foundation's Outpatient Mission Fund, the Ballingers had one less thing to worry about when they were given a free stay at a nearby hotel during Gerald's treatments.

*Living on a fixed income means any unexpected expense can be devastating. But your gift to the Outpatient Mission Fund helped Gerald and Linda Ballinger when they needed it most.*

"I can't tell you how much we appreciate the help," Linda said. "Without it, we wouldn't have been able to get his treatments."

Your donations allow the couple—high school sweethearts now married 57 years—to focus on Gerald's recovery instead of how they were going to pay for it. Now they can look forward to some of their favorite activities, like attending horse shows and rodeos.

**"We want to thank every donor to the Foundation. Without them, nobody in our situation would be able to get the care Gerald needed."**



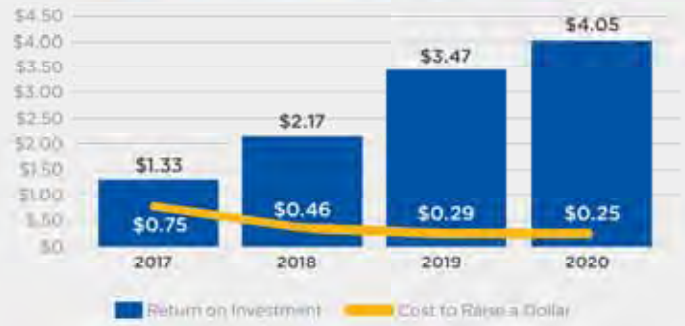
# Foundation Impact Report

## RICHMOND

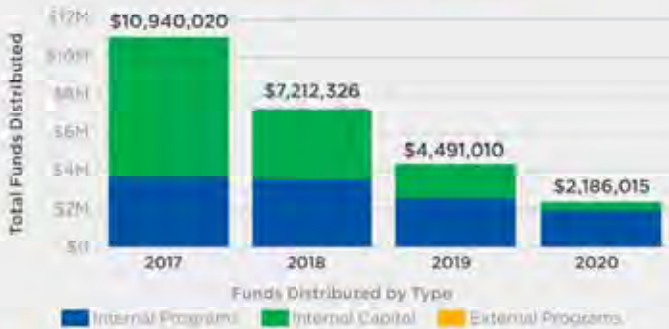
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION



## When grocery shelves were bare, **you helped Amanda** get specific foods for her five special needs children

For families who have children with special needs, everyday life can be challenging. For **Amanda Jones**, the mother of five special needs children, a global pandemic made simply feeding her kids nearly impossible.

"Allie alone has around 50 separate diagnoses," she said. "She uses feeding tubes for nutrition and fluids. And my other daughter was recently diagnosed with celiac disease. When the panic hit, the grocery shelves were bare. You can't substitute specific foods with regular foods. We couldn't find the foods we desperately needed."

Thanks to you, Amanda gets the special foods her children need at a food pantry started by Noah's Children, Bon Secours' pediatric palliative care program serving Central Virginia. As the

impact of COVID-19 has grown, more families have turned to the food pantry for non-perishable and frozen

foods, including gluten-free options and baby foods for children with special needs.

"It's a scary time right now with the uncertainties surrounding our health and our economy," she said. "Noah's Children takes the pressure off so I'm not constantly worried about keeping my kids alive."

Amanda appreciates access to specific food choices for her family, and she's also grateful for the holistic, compassionate care that Noah's Children provides.

**"Because of them, I get to be mom and focus on normal mom stuff," she said. "After talking to them, the weight of five kids and feeding tubes and medical things gets lifted off my shoulders for a while."**

*You helped 82 families and counting, including Amanda and her children.*





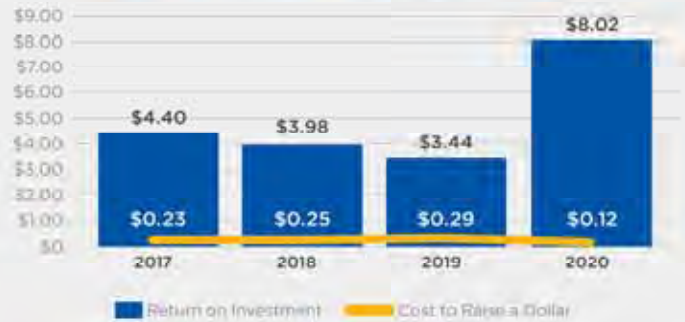
# Foundation Impact Report

## SPRINGFIELD

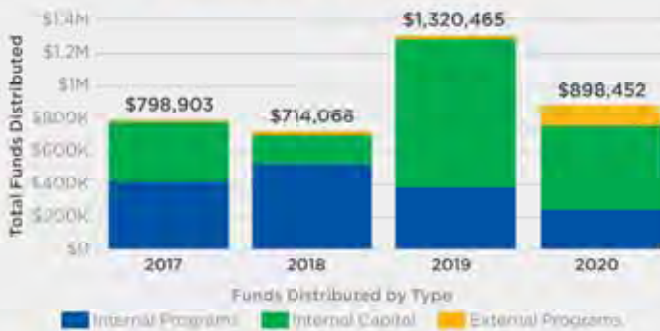
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





## You saved Rusty's life with a Cardiac Alert when he was having a heart attack

**Rusty Sindle** spent 21 years helping his community as an Emergency Medical Technician. But he never thought he'd be the one riding in the back of an ambulance as a patient.

Last November, he started having severe chest pains. He dragged himself upstairs to alert his wife, Nancy. When she called for an ambulance, it was Rusty's former colleagues that showed up.

"They knew immediately what was going on," Rusty said. "They told me I was about 10 minutes from death."

What happened next saved his life. The EMTs were able to call in a Cardiac Alert to the hospital which helped them bypass the Emergency Department and get Rusty

*The Cardiac Alert system, funded by donors like you, rushed Rusty Sindle from the ambulance straight to the cardiac cath lab for a stent, saving valuable time when even seconds meant the difference between life and death.*

straight into the Cath Lab where the medical team was able to insert a stent into his blocked artery.

**You saved Rusty's life that day. The Cardiac Alert system is in place because of your donation.**

Your gift made it possible for Rusty to receive the care he needed right away. Without it, the consequences may have been deadly and Rusty wouldn't be enjoying time with his children, grandchildren and great-grandchildren now.

"With the Cardiac Alert system, they were able to clear the lab and have it waiting for me," he said. "It worked perfectly, and I thank God for it every day—it saved my life."



# Foundation Impact Report

## ST. PETERSBURG

### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION



## Your gifts gave Maria a friend to ease the isolation of the pandemic

Maria is grateful for her four-legged friend. Your generosity supported the Electronic Pet Program that gave Maria, and fellow residents at Maria Manor, access to robotic pets.

Maria has been a resident of Maria Manor for over four years and has missed her pets since her move. Many residents have to say goodbye to their pets upon entering senior-living facilities. This chance to interact with a robotic pet has brought joy to Maria's days.

**The donor-funded Electronic Pet Program gives residents a chance to be comforted by the robot version of their favorite pets.**

"It means so much to our residents," says Michele McCann, Director of Recreational Therapy. "Our residents have especially missed their friends and families since visitor restrictions were put in place in March. The robotic pet program is another tool in our kit for providing therapeutic activity to our residents."

Loneliness and isolation have always been a concern for the aging residents of Maria Manor. Your gifts gave the residents comfort and companionship when it was needed most during the pandemic. Having access to the donor-funded Electronic Pet Program gives Maria Manor's social workers a unique way of addressing resident needs.

The Electronic Pets Program was made possible through your gifts to support the residents of Maria Manor. This program has been a blessing to Maria who has a renewed sense of independence with a robotic animal to care for.

Now, thanks to you, Maria feels more at home at Maria Manor with her electronic dog by her side.

*An electronic pet provided by donors like you gives comfort to Maria and other senior residents at Maria Manor.*





# Foundation Impact Report

## TOLEDO

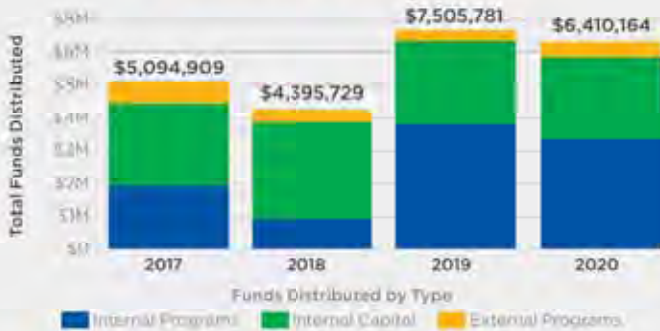
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION





## Thanks to you, Rose has gained strength and friends at the Senior Wellness Center

*Your donation is important for improvements to the Mercy Health – Senior Wellness Center so people like Rose have a great place to exercise, focus on their health and make new friends.*

For **Rose Johnson**, taking care of her health is serious business.

"I'm an avid walker. I try to accomplish 20,000+ steps each day and around 100,000+ steps per week," she said.

Rose walks, works out and gets other health services at her local Mercy Health Senior Wellness Center, which stays well maintained and updated thanks to your donation.

"I usually attend all the classes they have there," she said. "I use the screenings they offer for blood pressure and blood sugar, and I even use the dental program even though I have dental insurance. I like to have my teeth cleaned and checked quite often."

**Rose has seen benefits in her health from her visits to the Senior Wellness Center, especially from the new gym equipment, which you helped purchase.**

"I've gained good strength with my hands and arms. In my left hand, I didn't feel like I had as much strength, but by doing the weight training, that has helped immensely," she said. "All the equipment and programs that we have available to us are just awesome."

Rose says she has also gained friendships and fellowship from her time at the Senior Wellness Center, which she hopes will re-open again soon.

"I have some friends from the Center that are a little bit older and I've been checking on them during the pandemic," Rose added. "We all really appreciate the Center so much. I can say that not only for myself but for others."



# Foundation Impact Report

## YOUNGSTOWN

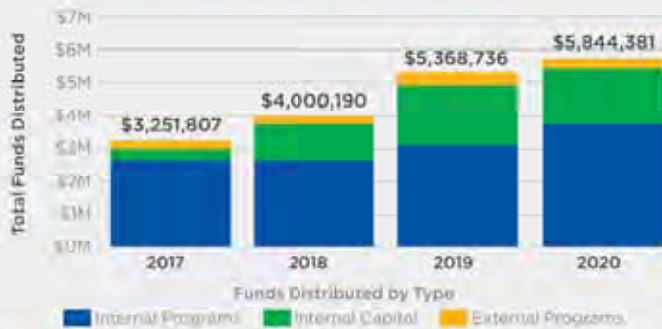
### TOTAL DOLLARS RAISED & EXPENSES



### ROI AND COST TO RAISE A DOLLAR



### PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



### BOARD GIVING PARTICIPATION



## You helped Jason recover from COVID-19

When **Jason Montgomery** felt sick in early March, he thought it was the flu. As his symptoms got worse a test confirmed he had COVID-19. But thanks to you, the team at Mercy Health — St. Elizabeth Boardman Hospital had everything it needed to save Jason's life and help him recover from the virus.

Jason was on a ventilator and in an induced coma for nearly two weeks. He was able to get a medication to fight the infection and had recovered enough to be removed from the ventilator three days later. He got the care he needed because of your generosity.

"It's a blessing to get that kind of care," Jason said.

When his health improved, he was taken off the ventilator and awak-ened from the induced coma. It was then that Jason finally came face-to-face with the team of caregivers that had saved his life. He calls them his heroes.

"Since my family couldn't be there, it was nice that everyone really seemed to care about me," Jason

added. "The nurses would wave and give me a thumbs up. There were nurses with tears in their eyes, just very excited for my well-being."

He is now recovering at home and getting stronger every day. He's even returned to work part-time.

Jason is thankful to be someone who survived COVID-19 and credits donor-supported Mercy Health for his recovery.

**I know the hospitals are really overwhelmed right now and would have a hard time without donors. It means a lot for me to even be here to say thank you to them.**

*Jason Montgomery is grateful for the donors who ensured his doctors and nurses had every resource to help him recover from COVID-19 which made him gravely ill.*





# Glossary

## Total dollars raised

Total dollars raised represents all outright gifts of cash (excluding payments on pledges from previous years), grant awards and new gift commitments made in the reporting year. New gift commitments include all new pledges and letters of intent (including revocable gift commitments) and the current market value of irrevocable planned gifts. Total dollars raised is a more thorough measurement of our fundraising performance than cash gifts alone.

## Total expense

Total expense—the sum of Foundation operating and employment expenses—helps us understand if we are managing our operations and making proper investment toward our long-term goals.

## Philanthropy support (foundation distributions)

Funds distributed from the Foundation in the current reporting period to or on behalf of Bon Secours Mercy Health for programmatic and capital needs. This figure does not include fund distributions from grants. These measures demonstrate the value of the Foundation to Bon Secours Mercy Health: using donors' generosity to help people live their best lives through true healing.

## Return on investment

ROI is the product of dividing gross funds raised by total fundraising (operating and employment) expenses, representing the financial return on each dollar spent raising funds during the reporting year. It is an indicator of fundraising effectiveness, illustrating the amount applied toward the bottom line, in relation to the cost. ROI helps us determine proper investment to generate greater fundraising revenue.

## Cost to raise a dollar

Foundation operating and employment expenses divided by revenue. Cost to raise a dollar is a measure of fundraising efficiency that evaluates the total amount spent to raise each dollar in support of our Mission. The costs and benefits of fundraising need to be evaluated in the proper context to ensure effective allocation of resources and strategies.

## Board giving participation (foundation and market)

The percentage of Foundation and market board members who make at least one gift per calendar year. When board members give, they strongly influence potential donors and demonstrate that raising funds is essential for our ministry. Board participation in giving of 100% sets a standard that potential donors respect.

## Bon Secours Mercy Health Foundation Leadership

President - **Tim Koder**

Baltimore, MD Market Foundation President - **Julie Mercer**

Charleston, SC Market Foundation President - **Ashley Redmond**

Cincinnati, OH Market Foundation President - **Jon Labbe**

Greenville, SC Market Foundation President - **Erik Whaley**

Hampton Roads, VA Market Foundation President - **Judy Bilicki**

Irvine, KY Market Foundation Director - **Arielle Estes**

Lima, OH Market Foundation President - **Sara Ambroza**

Lorain, OH Market Foundation President - **Scott Pember**

Paducah, KY Market Foundation President - **Jessica Toren**

Richmond, VA Market Foundation President - **Ann Carpin**

Springfield, OH Market Foundation President - **Kristy Kohl McCready**

St. Petersburg, FL Director of Development - **Mary Cate Ferguson**

Toledo, OH Market Foundation President - **Tim Koder**

Youngstown, OH Market Foundation President - **Paul Homick**

Vice President, Annual Programs - **Tara Miller**

Annual Programs Director - **Audrey Ginter**

Annual Programs Director - **Stephanie Jenks**

Annual Programs Director - **Anna Vanderburg**

Vice President, Charitable Estate & Planned Giving - **Brad Blandin**

Vice President, Solutions Group - **Eric Lemen**

Director, Operational Performance - **Amanda Baird**

Director, Data Solutions - **Teresa Dick**

Director, Research & Analytics - **Amanda Smith**

Director, Board Relations - **Becky Sittason**

Director, Grants - **Alice Parisi**



# GET A HEAD START ON YOUR 2021 GIVING!

Give for Good today toward our goal of 100% board and leader giving. You'll be proud of your impact on great health care in your community!

**Online:** [bonsecours.com/about-us/foundation](https://bonsecours.com/about-us/foundation)  
[foundation.mercy.com](https://foundation.mercy.com)

**In person:** visit your local foundation office

**Mail:** Bon Secours Mercy Health Foundation  
7115-Foundation, LBX 632660  
P.O. Box 5776  
Cincinnati, OH 45273-9942  
(Indicate market/special purpose to designate your gift)

**Phone:** (800) 999-2744

**GIVE FOR GOOD**



## MISSION PARTNERS

A Mission Partner is a friend of the Foundation that supports the greatest needs across the entire footprint of Bon Secours Mercy Health. Mission Partners make an impact in every community we serve and on every patient who comes to us for care.

### 2020 Mission Partners Impact

- \$875,000** committed by Mission Partners
- \$833,200** distributed evenly across 13 markets
- \$64,092** amount distributed to each market
- \$41,800** additional reimbursements to market foundations for Mission Partners recognition expenses
- \$417,000** additional donor contributions generated by leveraging Mission Partners giving as matching funds for End of Year Appeal
- 9** current Mission Partners members
- 1** new Mission Partner added in 2020
- 49** prospective members identified for cultivation/solicitation to grow membership

**Mission Partners provide much-needed funding to be used where the need is greatest.** Some of the projects and programs enhanced by Mission Partners giving include:

- COVID supplies, convert medical units to COVID isolation, negative pressure rooms, infirmary tents, UV room sterilizers
- New medical equipment such as ventilators, EMS vehicles, PET CT scanner, ultrasounds, telemetry, infant warmers, defibrillators and chest compression devices
- Facility renovations of lobbies, entrance areas, dining rooms, OB and pediatric units, and other spaces
- Breast cancer screenings, mobile mammography, diagnostic equipment and cold caps
- BSMH Associate Hardship Fund for those financially impacted by pandemic
- Patient assistance funding
- Adult and adolescent cancer care services
- Adult and pediatric hospice and palliative care
- Behavioral health services
- Opioid addiction treatment
- Scholarships and program staff salaries
- Community health outreach programs like Parish Nursing, Resource Mothers, Centering Pregnancy

### Current Mission Partners members



**BON SECOURS MERCY HEALTH**  
Foundation

## **BON SECOURS MERCY MINISTRIES**

Sr. Elaine Davia, CBS

Sr. Patricia Eck, CBS

Sr. Doris Gottemoeller, RSM

Sr. Rose Marie Jasinski, CBS

Sr. Marie Ryan, CBS

Colleen Scanlon, JD

Sr. Carol Anne Smith, HM

Sr. Mary Stanton, RSM



**BON SECOURS MERCY MINISTRIES**  
**1505 Marriottsville Road**  
**Marriottsville, MD 21104**  
**United States of America**