

2023 Foundation Impact & Performance Report



Theresa is grateful for our donors who support the Bon Secours Care-A-Van mobile clinic in Hampton Roads, VA. She gets the medications and treatment plan she needs to keep her diabetes under control and to be healthier than ever.

One of only 19 health systems honored as High Performer for net fundraising returns in top 75th percentile of U.S. and Canadian reporting organizations.



} 5 years
in a row!

From Our Board Chair & President

Dear donors, board members, leaders and Foundation team,

The Bon Secours Mercy Health (BSMH) Foundation had another successful year, exceeding targets and 2022 results. For the fifth consecutive year we were named an Association for Healthcare Philanthropy (AHP) high performer in the Overall and Health System categories. Even with the steepest decline in giving ever recorded by Giving USA and rising inflation, donors still chose to generously support the lifesaving and life-improving services provided by BSMH.

But fundraising isn't our only measure of success. Most importantly, donor contributions translated into more than \$58.27 million provided to or on behalf of BSMH for better health and wellbeing of individuals, families and communities across our ministry's footprint.

Helping more people in need inspires our vision for the future. It's a simple formula: when we raise more, more donors experience the joy of giving and more people get the help and health care they need for a better life.

The future is exciting for the BSMH Foundation. A new strategic plan was approved in 2023 that will keep us focused on raising \$500 million in five years and elevate total results across the Foundation. Key focus areas of the plan include:

- meaningful relationships that inspire major gifts, planned gifts and corporate/foundation giving

- government grants expanded for more projects and programs
- donor experience, stewardship and digital communications
- a Foundation culture that attracts and retains top talent and offers career growth
- innovative new revenue streams like providing our expertise and services to other organizations
- increased strategic investment in BSMH programs and services to help more people, families and communities

In 2023, we took some new steps to build toward the future.

- New tools like [GiveBSMH.org](https://www.givebsmh.org) and [Online Supporter Center](#) engage donors with inspiring stories, videos and opportunities to give and get involved. Soon website visitors can log in for a personalized experience that better connects them with what they're most passionate about.
- Staff and board members have more resources to help better connect with donors and prospective givers.

• **The first in a series of planned giving videos**

illustrates the power of using assets for future giving that offer immediate and long-term benefits for donors or their loved ones. [Scan QR code to watch the planned giving video.](#)



BON SECOURS MERCY HEALTH Foundation

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- New efficiencies in reporting, financial statements, funding requests and fund distributions help our market Foundation teams and boards make faster, easier decisions and reduce administrative tasks.

Nontraditional revenue can be a new source for growth by commercializing our Foundation’s fundraising and operational capabilities. One opportunity is under way with the merger of St. Luke’s Hospital Foundation and Mercy Health Foundation Greater Toledo. When McLaren Health Care announced plans to close the hospital in 2023, St. Luke’s Hospital Foundation viewed the Mercy Health Foundation as having the stability, expertise and shared values to continue their legacy. Early in 2024, over \$19 million in St. Luke’s Foundation assets were merged into the Mercy Health Foundation Greater Toledo and designated to honor their donors’ wishes for supporting health care and wellness services within St. Luke’s five-county service area.

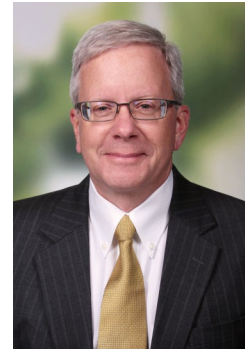
By creating a best-in-class donor experience and pursuing high-value opportunities, the future of the BSMH Foundation is bright and bold. We are grateful for every donor, board member, leader and Foundation team member who has played a role in the Foundation’s impact to date. And for those who will springboard the BSMH Foundation to future success.

Every person, family and community across Bon Secours Mercy Health’s footprint can have a better, healthier quality of life because of you.

With gratitude,

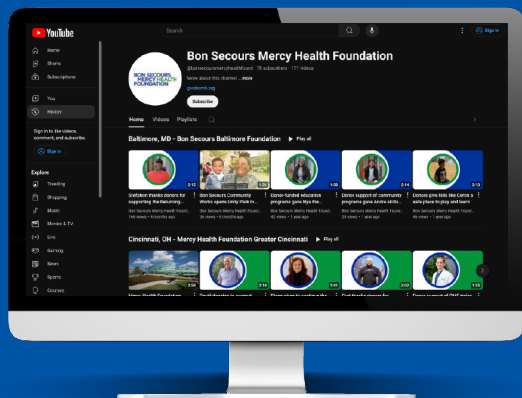


John Harris
John Harris, III
 Chair, Bon Secours
 Mercy Health Foundation
 Board of Directors



Tim Koder
Tim Koder
 President, Bon Secours
 Mercy Health Foundation
 President & CDO,
 Mercy Health Foundation
 Greater Toledo

50 new videos added in 2023!



Visit our video library on YouTube

Find videos by location and hear directly from 170+ donors, patients and beneficiaries who share their inspiration for giving and gratitude for life-changing help they’ve received.



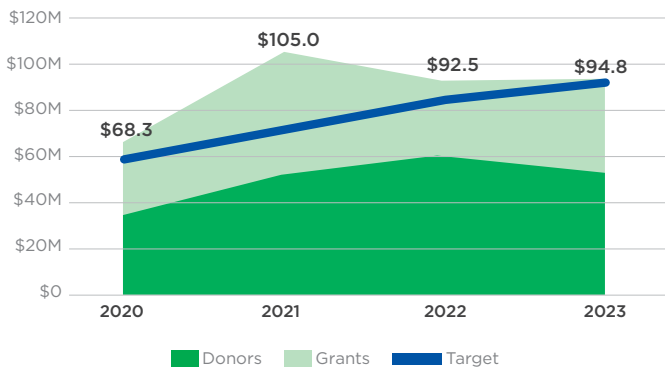
Scan QR code for video library

Foundation Impact Report

CONSOLIDATED RESULTS & MARKET PERFORMANCE

Target: Raise \$93.0 million
Stretch goal: \$110.6 million

REVENUE & TARGET TREND
 \$ IN MILLIONS

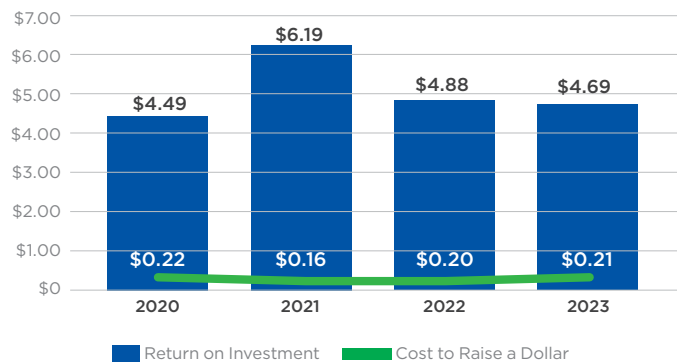


Results include grant revenue



Target: \$3.63 return on investment
Target: \$0.28 cost to raise a dollar

RETURN ON INVESTMENT AND COST TO RAISE A DOLLAR



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



| TOTAL DOLLARS RAISED | GOAL | 2023 | % of Goal | |
|-------------------------------|----------------|----------------|---------------|---|
| BSMH Foundation Total: | \$93.00 | \$94.83 | 102.0% | 🟢 |
| Baltimore | \$5.50 | \$5.76 | 104.7% | 🟢 |
| Charleston | \$9.00 | \$24.68 | 274.2% | 🟢 |
| Cincinnati | \$6.10 | \$3.64 | 59.7% | 🔴 |
| Greenville | \$5.00 | \$3.57 | 71.3% | 🔴 |
| Hampton Roads | \$1.00 | \$0.56 | 56.3% | 🔴 |
| Irvine | \$0.80 | \$1.42 | 176.9% | 🟢 |
| Lima | \$2.30 | \$2.69 | 116.8% | 🟢 |
| Lorain | \$2.75 | \$4.18 | 151.9% | 🟢 |
| Paducah | \$1.10 | \$1.42 | 128.7% | 🟢 |
| Richmond | \$7.25 | \$7.98 | 110.1% | 🟢 |
| Springfield | \$1.50 | \$2.18 | 145.4% | 🟢 |
| Toledo | \$20.50 | \$15.89 | 77.5% | 🔴 |
| Youngstown | \$7.70 | \$5.51 | 71.5% | 🔴 |
| Home Office | \$22.50 | \$15.37 | 68.3% | 🔴 |

PROGRESS KEY: 🟢 = > 100% 🟡 = 91.7%-99.9% 🔴 = < 91.6%

| ROI & CTRD | ROI BUDGET | ROI 2023 | CTRD BUDGET | CTRD 2023 | |
|-------------------------------|---------------|---------------|---------------|---------------|---|
| BSMH Foundation Total: | \$3.63 | \$4.69 | \$0.28 | \$0.21 | 🟢 |
| Baltimore | \$11.12 | \$14.20 | \$0.09 | \$0.07 | 🟢 |
| Charleston | \$1.64 | \$5.64 | \$0.61 | \$0.18 | 🟢 |
| Cincinnati | \$5.72 | \$4.27 | \$0.17 | \$0.23 | 🟡 |
| Greenville | \$10.19 | \$8.06 | \$0.10 | \$0.12 | 🟡 |
| Hampton Roads | \$1.80 | \$1.20 | \$0.56 | \$0.83 | 🟡 |
| Irvine | \$533.34 | \$334.37 | \$0.00 | \$0.00 | 🟡 |
| Lima | \$11.50 | \$11.36 | \$0.09 | \$0.09 | 🟡 |
| Lorain | \$3.95 | \$7.14 | \$0.25 | \$0.14 | 🟢 |
| Paducah | \$3.71 | \$4.46 | \$0.27 | \$0.22 | 🟢 |
| Richmond | \$4.69 | \$5.38 | \$0.21 | \$0.19 | 🟢 |
| Springfield | \$4.13 | \$6.92 | \$0.24 | \$0.14 | 🟢 |
| Toledo | \$22.47 | \$33.46 | \$0.04 | \$0.03 | 🟢 |
| Youngstown | \$7.47 | \$5.59 | \$0.13 | \$0.18 | 🟡 |
| Home Office | \$1.32 | \$1.66 | \$0.76 | \$0.60 | 🟢 |

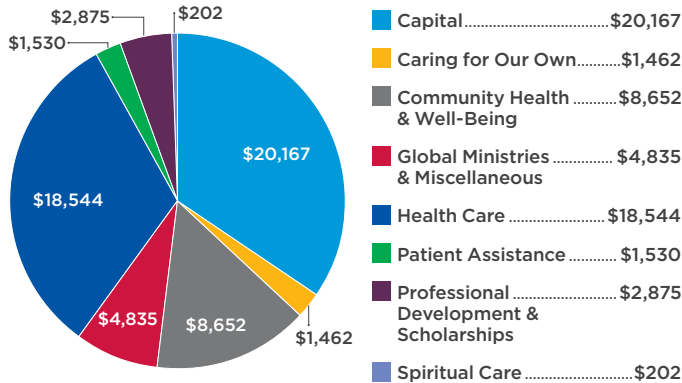
PROGRESS KEY: 🟢 = Met/exceeded target 🟡 = Short of target



Target: Provide \$49 million in fund distributions to or on behalf of Bon Secours Mercy Health

**MINISTRY PHILANTHROPIC SUPPORT
\$58.27 MILLION**

\$ IN THOUSANDS

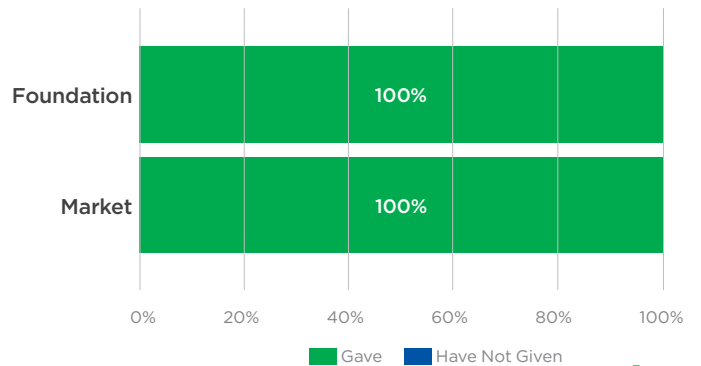


Includes additional grant support to the ministry



Target: 100% Foundation board giving participation

BOARD GIVING PARTICIPATION



First time ever! **100%**



| PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS) | GOAL | 2023 | % of Goal Reached | |
|---|----------------|----------------|-------------------|--|
| BSMH Foundation Total: | \$49.00 | \$58.27 | 118.9% | |
| Baltimore | \$3.30 | \$2.87 | 87.0% | |
| Charleston | \$5.40 | \$5.47 | 101.4% | |
| Cincinnati | \$3.66 | \$1.72 | 46.9% | |
| Greenville | \$3.00 | \$1.35 | 45.0% | |
| Hampton Roads | \$0.60 | \$1.10 | 183.1% | |
| Irvine | \$0.48 | \$0.06 | 12.1% | |
| Lima | \$1.38 | \$2.44 | 176.8% | |
| Lorain | \$1.65 | \$0.99 | 59.9% | |
| Paducah | \$0.66 | \$1.74 | 263.1% | |
| Richmond | \$4.35 | \$10.61 | 244.0% | |
| Springfield | \$0.70 | \$0.98 | 139.4% | |
| Toledo | \$12.30 | \$9.58 | 77.9% | |
| Youngstown | \$4.62 | \$7.99 | 172.9% | |
| Home Office | \$6.90 | \$11.38 | 164.9% | |

PROGRESS KEY: = >100% = 91.7% - 99.9% = <91.6%

| BOARD GIVING | Foundation Board | | | Market Board | | |
|-------------------------------|------------------|-------------|--|--------------|-------------|--|
| | GOAL | 2023 | | GOAL | 2023 | |
| BSMH Foundation Total: | 100% | 100% | | 100% | 100% | |
| Baltimore | 100% | 100% | | 100% | 100% | |
| Charleston | 100% | 100% | | 100% | 100% | |
| Cincinnati | 100% | 100% | | 100% | 100% | |
| Greenville | 100% | 100% | | 100% | 100% | |
| Hampton Roads | 100% | 100% | | 100% | 100% | |
| Irvine | 100% | 100% | | 100% | 100% | |
| Lima | 100% | 100% | | 100% | 100% | |
| Lorain | 100% | 100% | | 100% | 100% | |
| Paducah | 100% | 100% | | 100% | 100% | |
| Richmond | 100% | 100% | | 100% | 100% | |
| Springfield | 100% | 100% | | 100% | 100% | |
| Toledo | 100% | 100% | | 100% | 100% | |
| Youngstown | 100% | 100% | | 100% | 100% | |
| Home Office | 100% | 100% | | 100% | 100% | |

PROGRESS KEY: = >100% = 91.7% - 99.9% = <91.6%



Foundation Impact Report

FINANCIAL OVERVIEW

Operating Performance YTD December 2023 (unaudited)

U.S. dollars in thousands

| | ACTUAL | BUDGET | VARIANCE | PRIOR YEAR |
|------------------------------------|-----------------|-----------------|----------------|-----------------|
| NEW REVENUE RAISED | \$94,827 | \$93,000 | \$1,827 | \$92,521 |
| Operating Expenses | | | | |
| Employment Expenses | \$15,643 | \$18,491 | \$2,848 | \$14,311 |
| Purchased Services | \$2,977 | \$5,195 | \$2,217 | \$2,860 |
| Supplies, Utilities, Travel, Other | \$1,225 | \$1,439 | \$214 | \$1,246 |
| Miscellaneous | \$365 | \$489 | \$123 | \$549 |
| Total Operating Expenses | \$20,211 | \$25,614 | \$5,403 | \$18,967 |
| Return on Investment | \$4.69 | \$3.63 | | \$4.88 |
| Cost to Raise a Dollar | \$0.213 | \$0.275 | | \$0.205 |
| Ministry Support | \$58,270 | \$55,800 | \$2,470 | \$62,177 |

*Includes Roper St. Francis Foundation

Consolidated Balance Sheet December 2023 (unaudited)

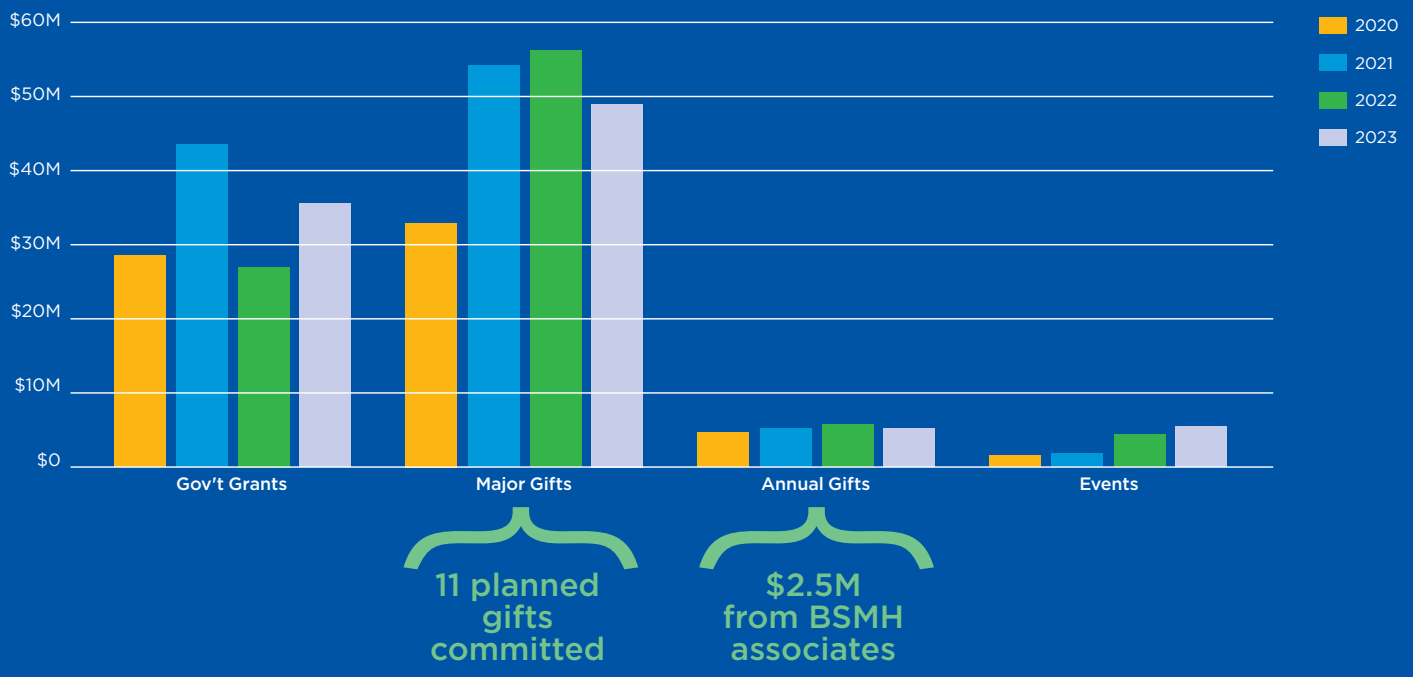
U.S. dollars in thousands

| ASSETS | |
|--|------------------|
| Current Assets | |
| Cash and Cash Equivalents | \$355,643 |
| Other Receivables | \$8,630 |
| Prepaid Expense and Other Current Assets | \$372 |
| Total Current Assets | \$364,645 |
| Property and Equipment - Net | \$1,075 |
| Other Assets | \$5,220 |
| Total Assets | \$370,940 |

| LIABILITIES AND FUND BALANCE | |
|---|------------------|
| Current Liabilities | |
| Accounts Payable | \$14,322 |
| Other Long-term Liabilities | \$466 |
| Total Liabilities | \$14,788 |
| Net Assets | |
| Without Donor Restrictions | \$155,461 |
| With Donor Restrictions | \$200,692 |
| Total Net Assets | \$356,153 |
| Total Liabilities and Net Assets | \$370,940 |

*Excludes Roper St. Francis Foundation

4-year Fundraising Revenue by source



Bon Secours Mercy Health Foundation Strategic Plan 2024-2028 | Board Approved in 2023

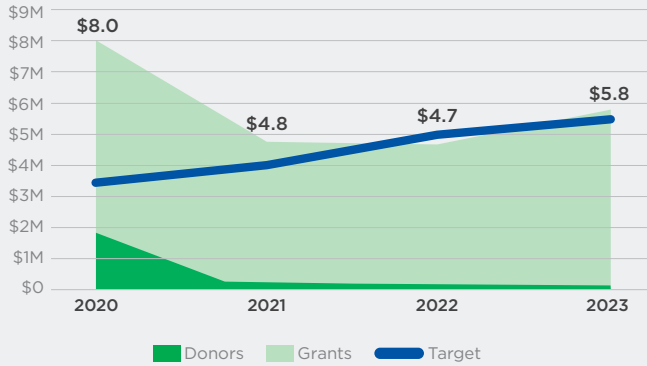


Bon Secours Baltimore Foundation

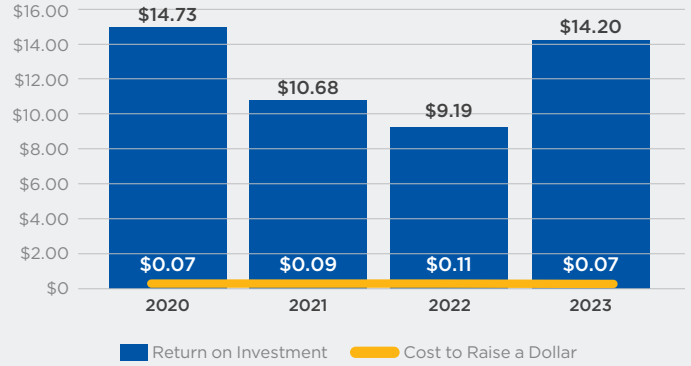
Baltimore, MD

REVENUE & TARGET TREND

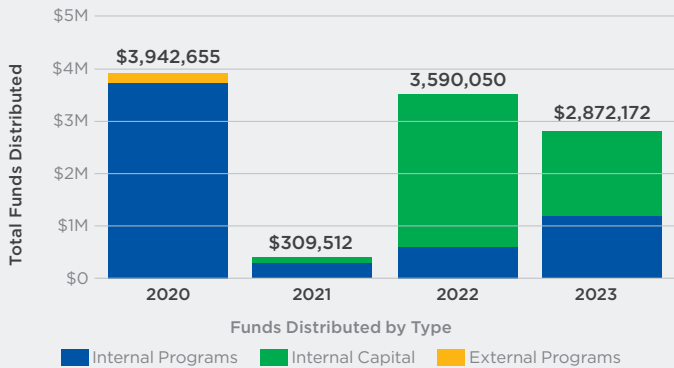
\$ IN MILLIONS



ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



Donors helped Nya find her calling in health care

Since graduating from Bon Secours Community Works' Healthcare Training & Certification program, Nya Smith has found employment as a certified nursing assistant. Thanks to donors, she is living her dream today.

"I've always cared for elders in my family since I was young," says Nya. "I decided to pursue a career in healthcare because I like helping people."

Bon Secours Community Works offers multiple paths of training to help West Baltimore residents advance their careers and enter the medical field with an industry recognized certification. Current programs exist for certified nursing assistant/geriatric nursing assistant, certified medical administrative assistant, and patient care technician.

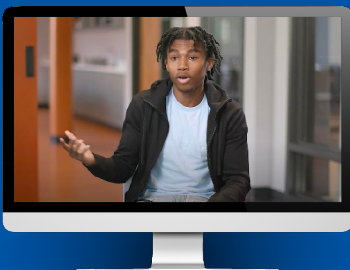
The training supported by donors put Nya on a career path that would otherwise be unavailable to her.

"If I wasn't able to get this training, I'd still be working in retail but I wouldn't be as happy mentally or physically," Nya says. "Some jobs strain your mental health but now I can get pleasure out of working."

Nya is thankful to Bon Secours Baltimore Foundation donors whose generosity and faith in her have made her future possible.

"What I've learned about Bon Secours is their principles and their morals. They won't stop. They'll get you through the program," Nya shares. "I had a lot of obstacles because I am a teen parent and I always had things come up with my son, but they never gave up on me."

Certified nursing assistant Nya Smith received important training, thanks to Bon Secours donors.



WATCH: Donations to Bon Secours Baltimore Foundation support the Youth Employment and Entrepreneurship Program that gives teens like Andre Nicholson skills for future success.



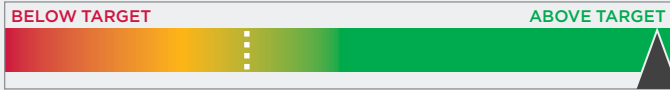
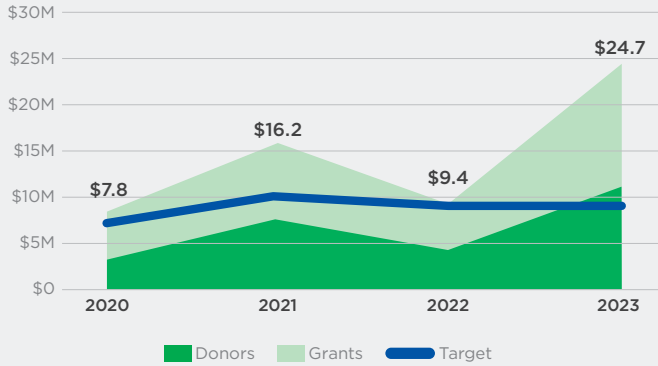
Click or scan the QR code to hear from Andre

Roper St. Francis Foundation

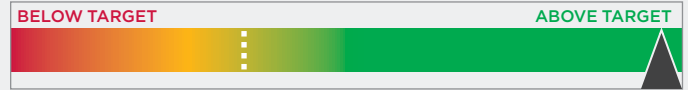
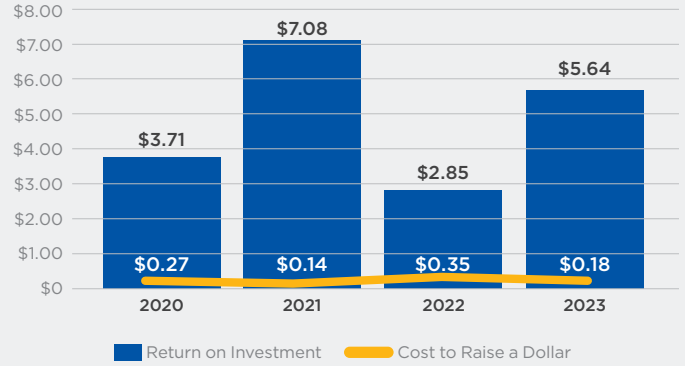
Charleston, SC

REVENUE & TARGET TREND

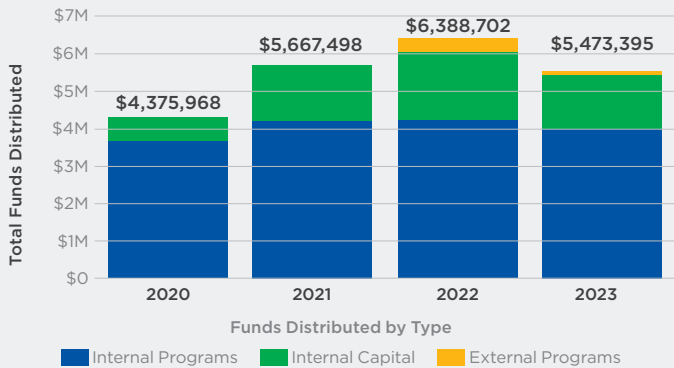
\$ IN MILLIONS



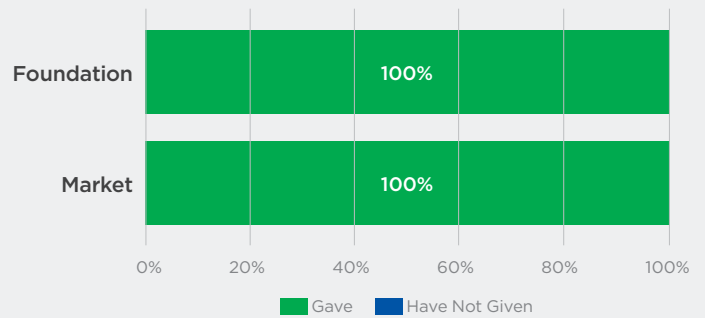
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



STORIES OF IMPACT

Roper St. Francis Foundation
Charleston, SC

Thanks to donors, the Oncology Nurse Navigator Program helped Lauren through her cancer diagnosis. They were there for her, so she could be there for her growing family.

Donors guided Lauren through the most difficult time in her life

Three years ago, Lauren heard the words one prays to never hear – “you have cancer.” She was completely shocked by the news. A cancer diagnosis comes with many unanswered questions and concerns, especially for a 34-year-old new mom. She wondered what she was going to do.

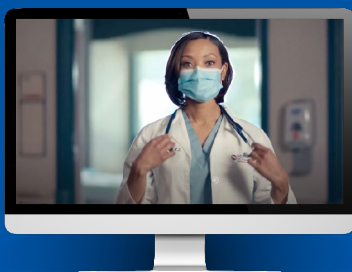
With your support, Lauren was able to receive guidance from a nurse navigator, a Roper St. Francis Healthcare provider who works directly with cancer patients and their families to develop a program of support that is designed to meet their specific needs.

“I was getting a level of care that was special and unique at Roper St. Francis,” Lauren says. “I was taken aback by that.”

Thanks to your generous support, the Oncology Nurse Navigator Program is completely free of charge. It allowed Lauren to have a familiar, consistent source of support to help her understand her diagnosis and receive family and financial assistance while she focused on her treatment and healing.

Lauren has talked to many cancer survivors and has seen that not everyone was as fortunate as she was when receiving care and compassion during a harrowing time. After 6 cycles of chemotherapy, 25 rounds of radiation, 11 cycles of immunotherapy, and a double mastectomy, Lauren is officially cancer free and happy to share that she is pregnant again.

Because of your support, Lauren is now thriving as a cancer survivor and looks forward to spending every moment to the fullest.



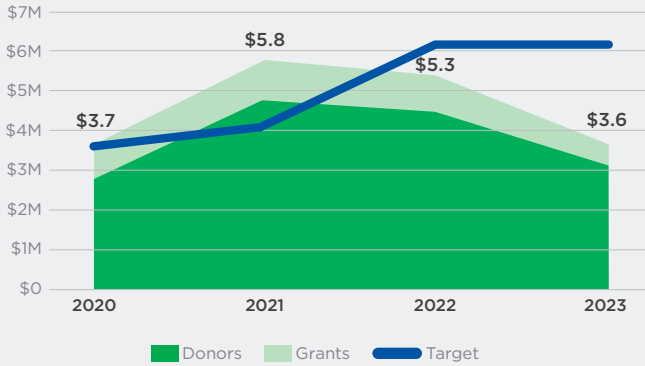
WATCH: Roper St. Francis believes in their caregivers.



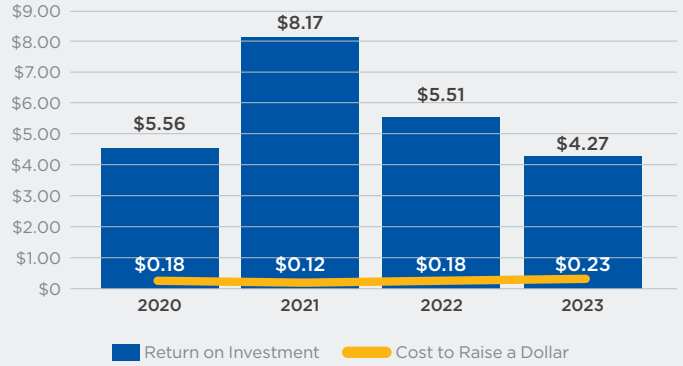
Click or scan the QR code to watch a video about caregivers at Roper St. Francis

Mercy Health Foundation Cincinnati, OH

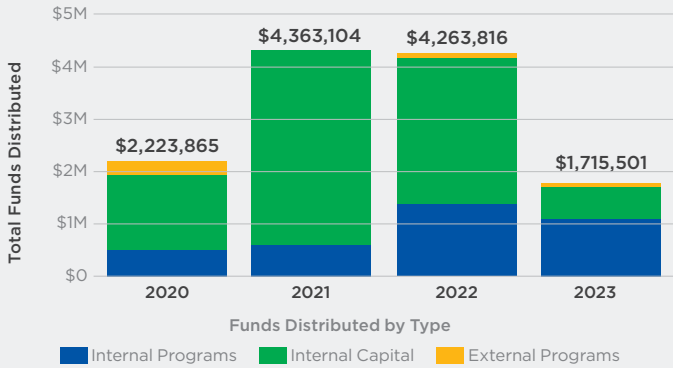
REVENUE & TARGET TREND
\$ IN MILLIONS



ROI AND COST TO RAISE A DOLLAR



**PHILANTHROPY SUPPORT
(FOUNDATION DISTRIBUTIONS)**



BOARD GIVING PARTICIPATION





STORIES OF IMPACT

Mercy Health Foundation
Cincinnati, OH

Donors give to perinatal outreach so families like Sharrvee's can thrive.

Sharrvee and her baby are doing great **because of help from donors**

When working mom Sharrvee Edmonds was expecting her second child, she knew she would need some extra help. Donations for Mercy Health Perinatal Outreach provide support and resources for new mothers. That meant help was available for Sharrvee.

"They helped me with getting vouchers that I needed for a crib," Sharrvee says. "She gives me diapers and bottles."

Without help for those necessities, Sharrvee says it would have been a challenge to get them for her baby. But even more than items, Sharrvee says that, as a new mom, the overall support from her Perinatal Outreach Coordinator has been critical.

"She's always checking on me," Sharrvee says.

"Sometimes mothers don't think about themselves. She always asks about me and how I am doing."

"She's also a very good listener," she says. "When I needed help with breast feeding, she gave me resources and she gave me a lot of resources on healthy foods like fruit and vegetables. When I was pregnant, she gave me resources for programs like Dancing Moms."

Sharrvee is grateful for donors who support this outreach that has been there for her when she needed it the most.

"I let everybody know about this program because that's the most help I could ever ask for besides my family," she says. "They make life so much better for mothers."



WATCH: Thanks to donors, The Jewish Hospital — Mercy Health has the equipment needed to provide residents with advanced Graduate Medical Education.

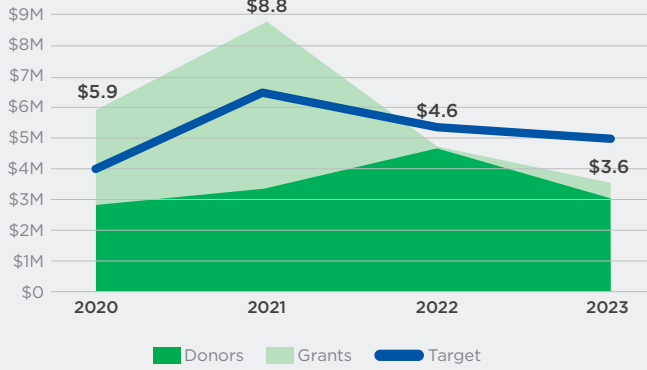


Click or scan the QR code to see how donors are helping train the future of health care

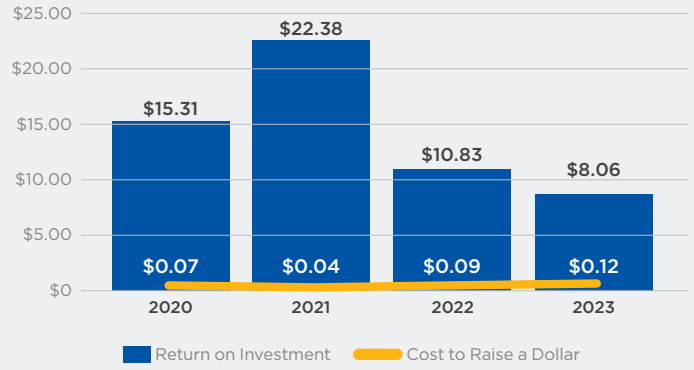
Bon Secours St. Francis Foundation Greenville, SC

REVENUE & TARGET TREND

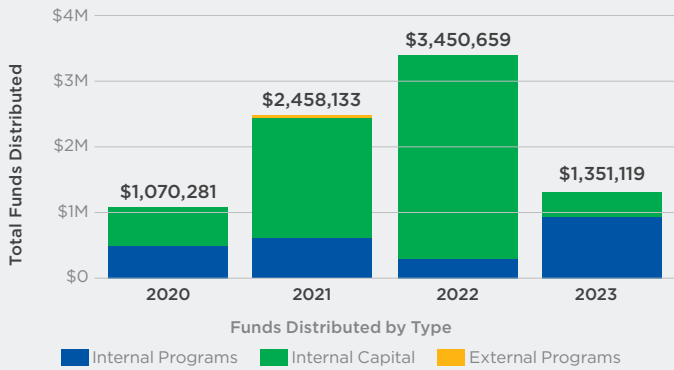
\$ IN MILLIONS



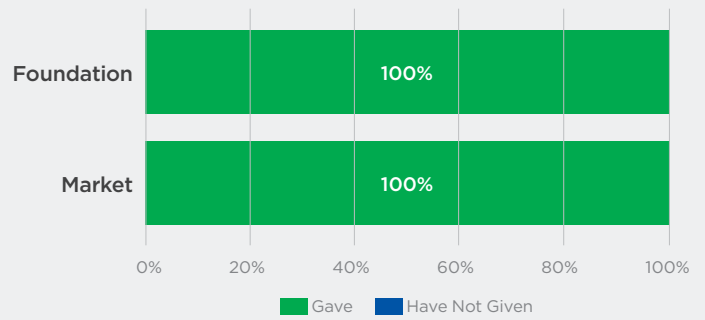
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



Jacqueline got life-saving cancer care under one roof, thanks to donors

Bon Secours St. Francis has always taken great care of Jacqueline Sharperson. After having spinal surgery, Jacqueline returned to St. Francis for a mammogram due to pain in her breast. When tests confirmed Stage 3 breast cancer, the St. Francis team did what they do best.

“When the doctor gave me the diagnosis, they immediately had a folder with three appointments in it and it was loaded with information,” she recalls. “They already had a surgeon, an oncologist and a plastic surgeon scheduled. I felt like I was being taken care of.”

Thanks to generous donor support, the St. Francis Cancer Center was able to provide Jacqueline with compassionate, comprehensive care close to home and all under one roof.

“It was so wonderful to get all my care at St. Francis,” she says. “They worked as a team and I could feel the team effort because there was no miscommunication.”

Today, Jacqueline is eternally grateful for the impact that donations had on her healing journey.

“The Cancer Center takes care of the mind, body and soul,” she says. “Sister Dorothy was there for the soul. My team was there for my health care, and behavioral therapy was right there for my mind. It all helped me, and your donor money does that.”

Jacqueline is thankful that donor support allowed her to take her cancer journey in a loving, caring environment at the St. Francis Cancer Center.



WATCH: Bon Secours St. Francis Foundation is committed to quality health care for Greenville area communities.

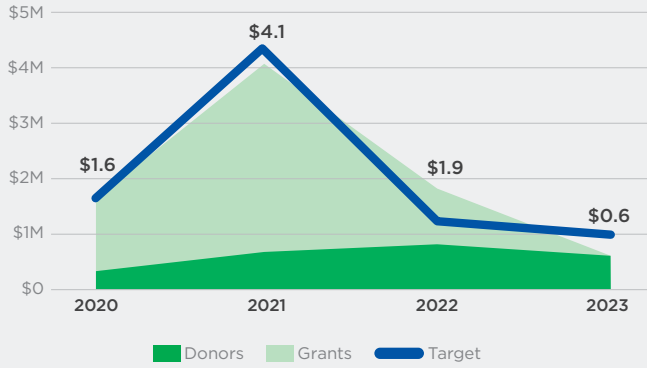


Click or scan the QR code to see how Bon Secours St. Francis Foundation donors make a difference

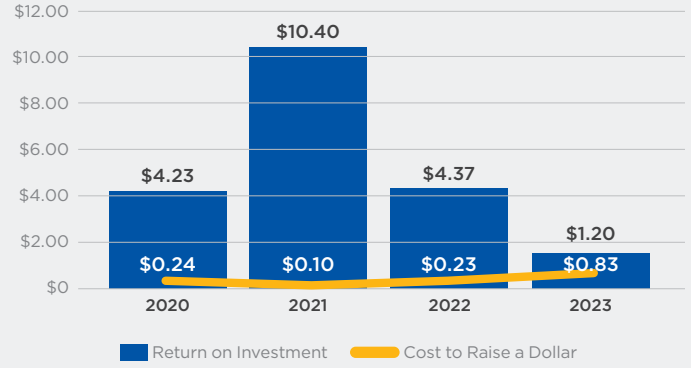
Bon Secours Hampton Roads Foundation

Hampton Roads, VA

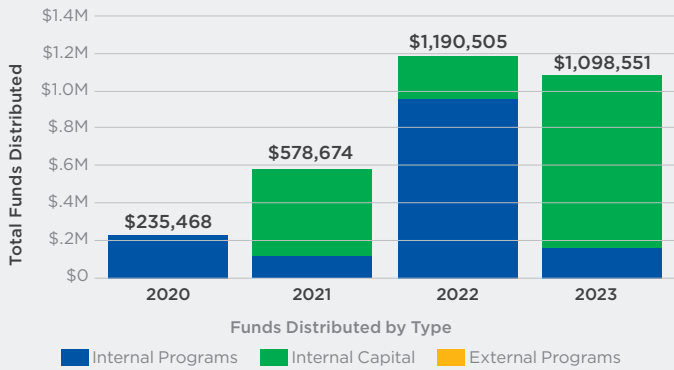
REVENUE & TARGET TREND
\$ IN MILLIONS



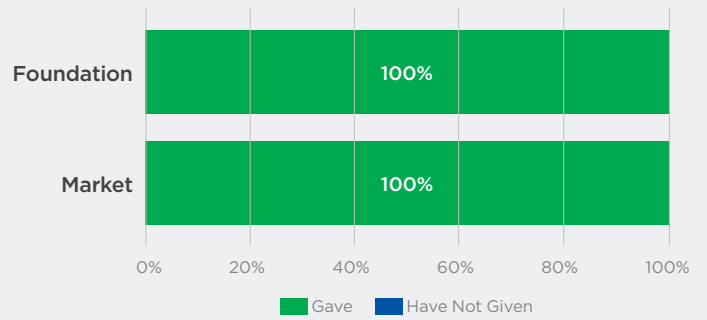
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION





STORIES OF IMPACT

Bon Secours
Hampton Roads
Foundation

Hampton Roads, VA

Theresa is healthier than ever since starting medications to treat her diabetes. She's grateful for the Care-A-Van to help monitor her levels and treatment plan.

Donations for the Care-A-Van mobile clinic help Theresa manage her diabetes

For years, Theresa Boone was getting sicker and sicker but doctors couldn't find the cause. Then she found out about the Bon Secours Hampton Roads Mobile Care-A-Van.

"When I went to the Care-A-Van, they checked everything and I found out I had diabetes," she says. "They got me the medicines I needed to take."

Because diabetes is a health issue that needs to be consistently managed, regular visits to the Care-A-Van help Theresa stay on top of her health.

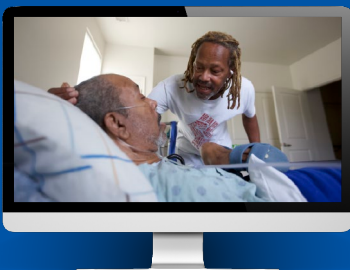
"They take my levels and call me when I need to have it checked," Theresa says. "And they help me with the medicines to take."

For Theresa, the Care-A-Van, which is supported by donations to Bon Secours Hampton Roads Foundation, is the best way to fit health care into her schedule.

"On the days that I'm not working, I can go and see them," Theresa adds. "When I've had other problems, they find help and call to make appointments for me."

Theresa says she's healthier than ever, noting that her A1C level is the best it's ever been.

"You should pat yourself on the back because you are doing a good thing to help people," Theresa says of foundation donors. "God is going to bless you for helping me out."



WATCH: Hospice helped Garrett care for his brother at home, thanks to donors.



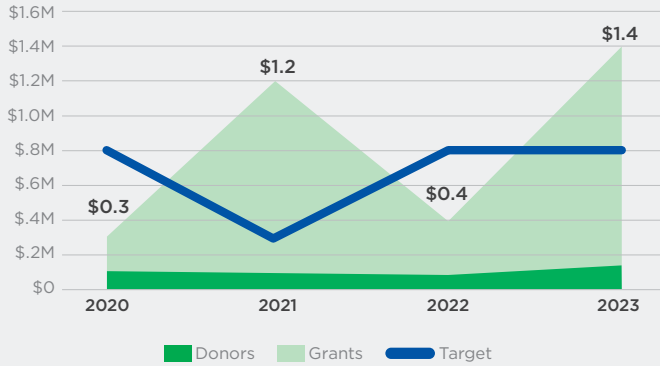
Click or scan the QR code to hear from Garrett

Mercy Health Foundation Irvine

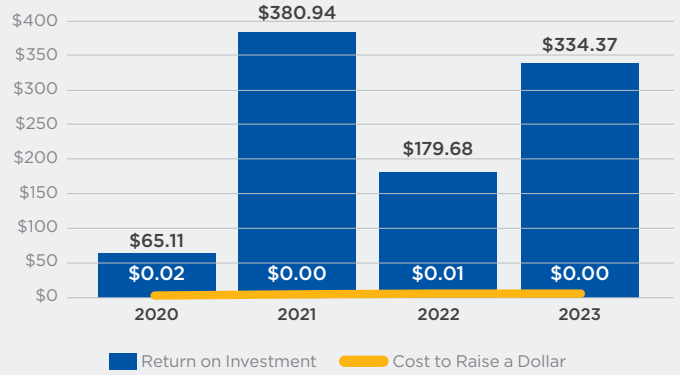
Irvine, KY

REVENUE & TARGET TREND

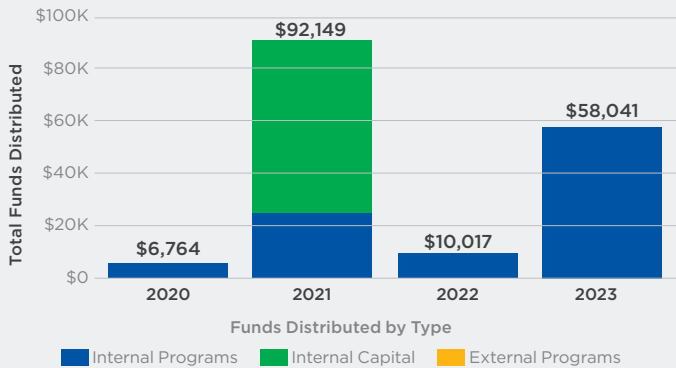
\$ IN MILLIONS



ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



Donations help provide free health fair screenings that discovered Larry's heart condition

When Larry Stewart saw a newspaper ad for one of Mercy Health – Marcum and Wallace Hospital's free health fairs, he and his wife decided to go. Now he credits donors who help fund the nearby events with saving his life.

At the health fair Larry was surprised when the radiologist conducting a screening told him he had severe blockages in the blood vessels around his heart. He had been diagnosed with some minor blockages a few years ago but they didn't require treatment.

"If I hadn't had the screening, I don't think I would be here right now," Larry says. "I'm thankful to everyone who played a part in the process. They saved my life."

Larry's primary care doctor received his screening results and ordered some additional tests that confirmed the findings. Larry had

open heart surgery only two days after a cardiologist found his heart had two 100% blockages, a 95% blockage, a 75% blockage and a leaking aortic valve.

Today Larry is retired and feels good, getting stronger every day. He's proud of his local hospital and grateful for Mercy Health Foundation Irvine donors who support health care services in his community.

"Marcum and Wallace is a small rural hospital, but they do a great job," Larry says. "I thank the donors from the bottom of my new heart! It was caught in time and taken care of."



Larry Stewart is grateful for donors who support his hometown hospital and the free health fairs where his life-threatening heart blockages were found.



WATCH: Donor-funded 3D mammography means Ann gets her results and peace of mind much faster.

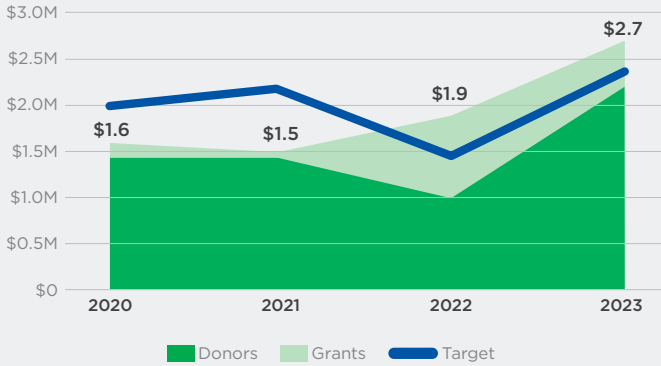


Click or scan the QR code to hear from Ann

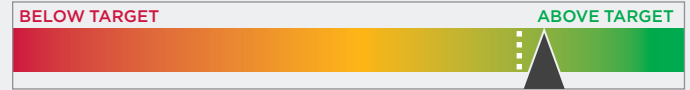
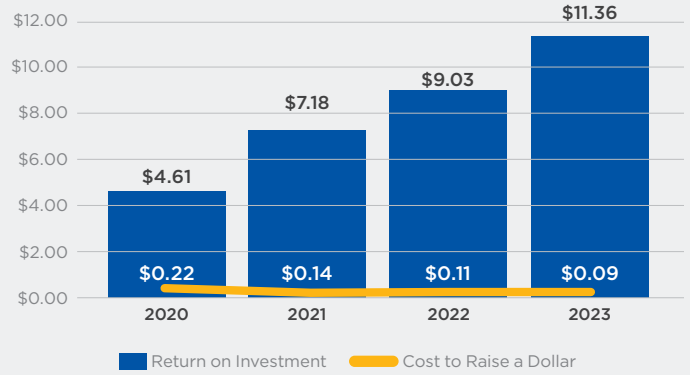
Mercy Health Foundation Greater Lima

Lima, OH

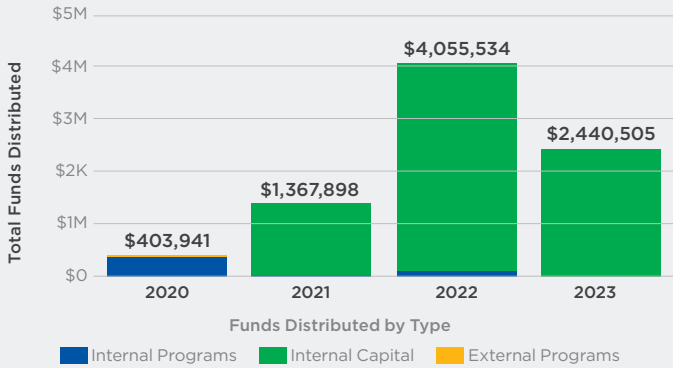
REVENUE & TARGET TREND
\$ IN MILLIONS



ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION





STORIES OF IMPACT

Mercy Health Foundation
Greater Lima
Lima, OH

Preslee struggled to overcome her addiction until she came to the behavioral health unit at Mercy Health — St. Rita’s Medical Center, a program supported by donations to the Foundation.

Thanks to donors, Preslee found the care she needed to get sober

Preslee Burden had tried other treatments for her drug addiction, but nothing ever worked for long. That is until she came to Mercy Health — St. Rita’s Medical Center and was admitted into the behavioral health unit.

Donor generosity has helped Preslee and others beat their addictions and become themselves again.

“My struggle with addiction started early,” she says. “It began with smoking and drinking, but by the time I was 16 I was using heroin. I tried treatment center after treatment center, but I would finish the program and then go right back to using drugs.”

Preslee has been sober for several years now. Donor gifts gave her the tools to match with her strength and motivation to move forward with her life.

“I was able to get the medication I needed for withdrawals and there were counselors and nurses available to help me at all hours,” she says. “I felt listened to and supported. They made sure I was ready for each step.”

She now lives on her own, has a car, a full-time job and a small business of her own.

“I found that if I could go through the things I have and come out on the other side, I can do whatever I want in life,” she says.

“Without donors I wouldn’t have been able to get the treatment I needed to be where I am today. I would still be struggling and using drugs. None of this would be possible without help.”



WATCH: Donations for the best technology help Carissa detect signs of breast cancer.



Click or scan the QR code to hear Carissa’s story.

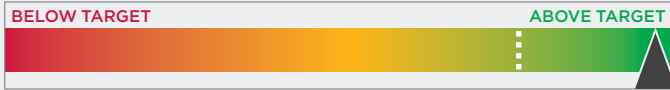
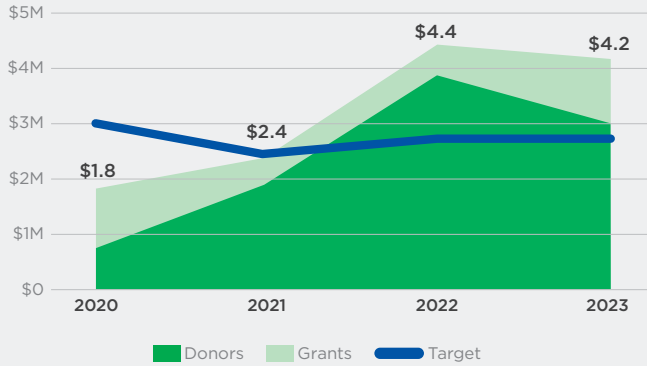


Mercy Health Foundation Lorain

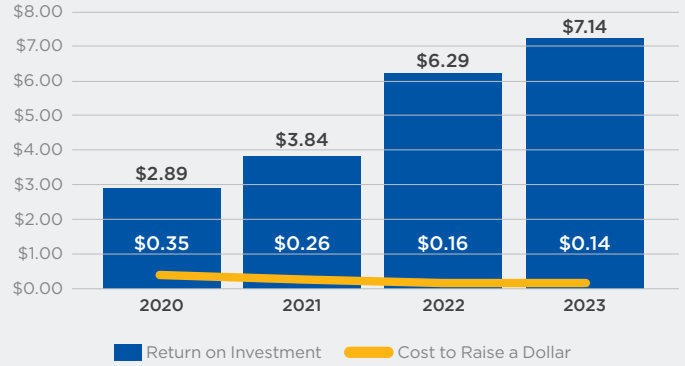
Lorain, OH

REVENUE & TARGET TREND

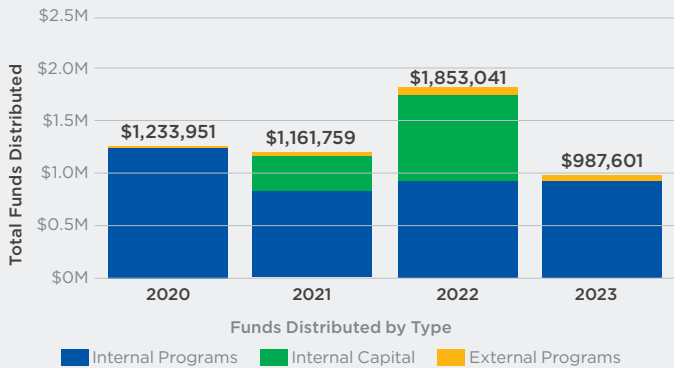
\$ IN MILLIONS



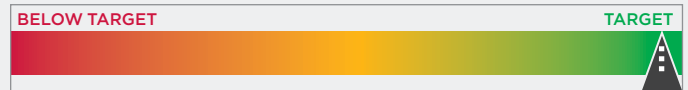
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



Dr. Lomano is thankful for donors who ensure life-saving heart care in Lorain

As a physician, Dr. Jack M. Lomano knew something wasn't right when he started having chest pains. Fortunately, he also knew that Mercy Health — Lorain Hospital was nearby while he and his wife were spending the summer in the community.

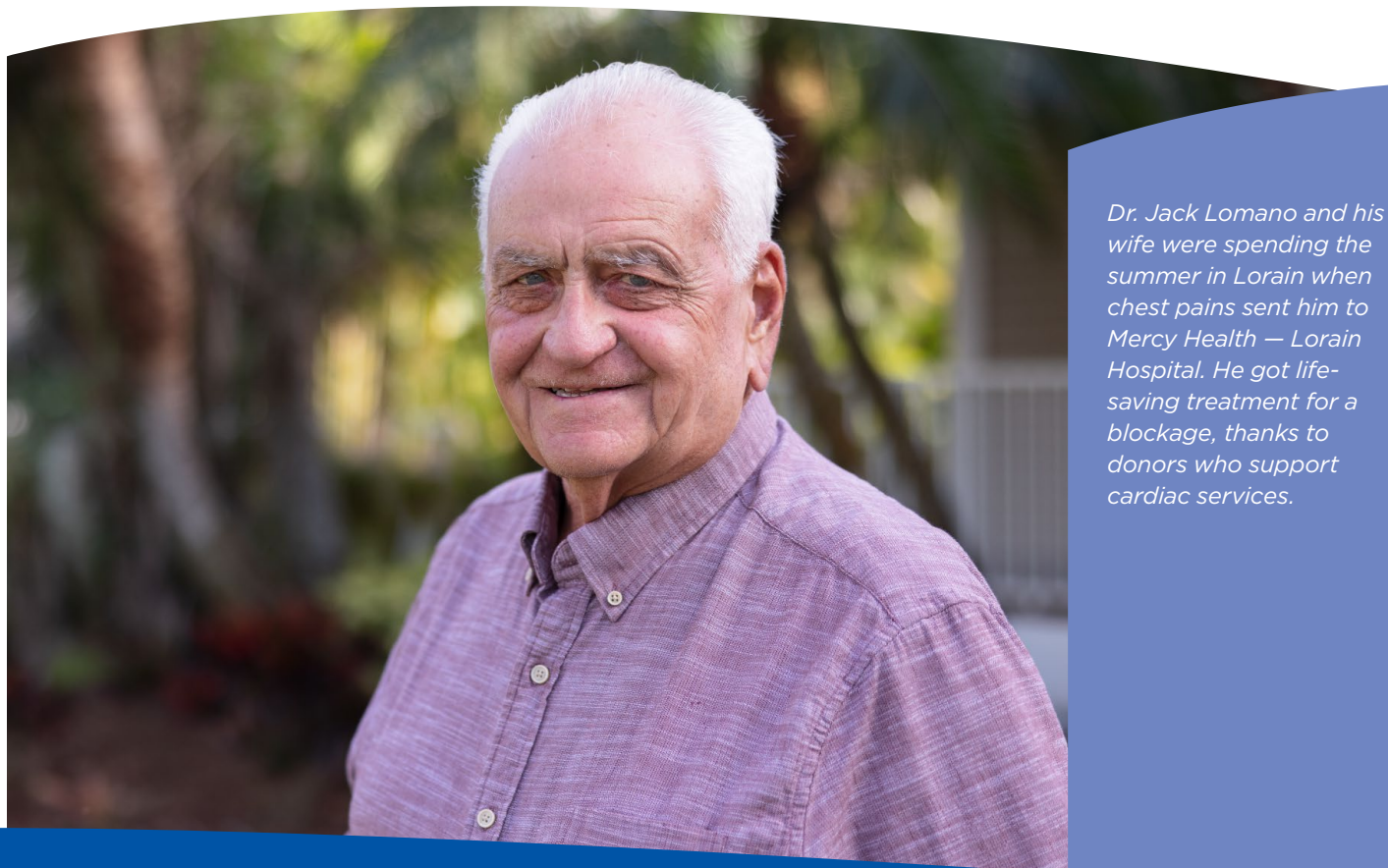
Thanks to Mercy Health Foundation Lorain donors who contribute to advancements in the hospital's heart care services, Dr. Lomano was treated quickly for a life-threatening blockage of his main coronary artery.

"I had no personal history of heart issues and felt generally healthy, but it kept getting a little worse," he says. "Luckily, I was able to get to the hospital early."

The Lomanos appreciate the impact of donations to the hospital and cardiac care services in particular. Dr. Lomano said the care was outstanding, including how the chaplain made sure his wife was kept informed and comfortable.

"I'm very grateful for the care I received," he adds. "Everyone from the emergency department, to having the EKG, and going to the Cath Lab went very smoothly."

"Donors ought to be very proud of where they are putting their money, because it is paying off for the community."



Dr. Jack Lomano and his wife were spending the summer in Lorain when chest pains sent him to Mercy Health — Lorain Hospital. He got life-saving treatment for a blockage, thanks to donors who support cardiac services.



WATCH: Donations for a nurse navigator helped Linda through her cancer battle.

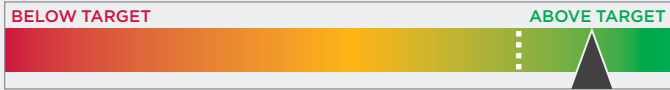
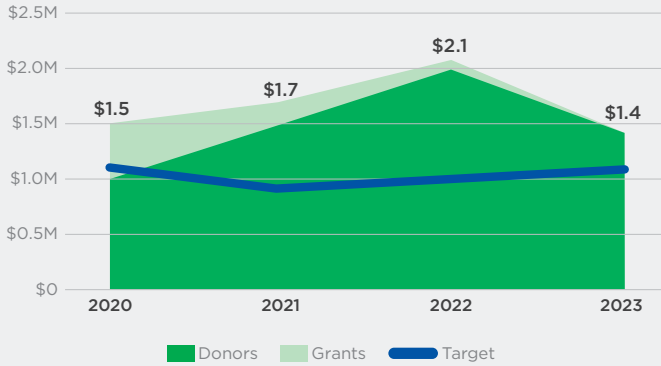


Click or scan the QR code to hear from Linda

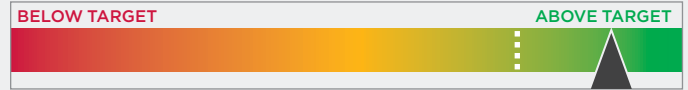
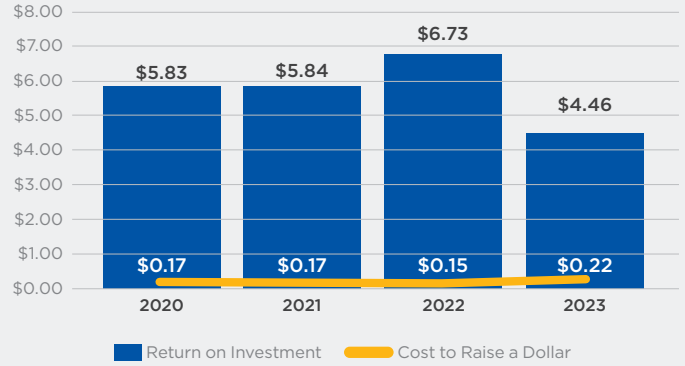
Mercy Health Foundation Lourdes Paducah, KY

REVENUE & TARGET TREND

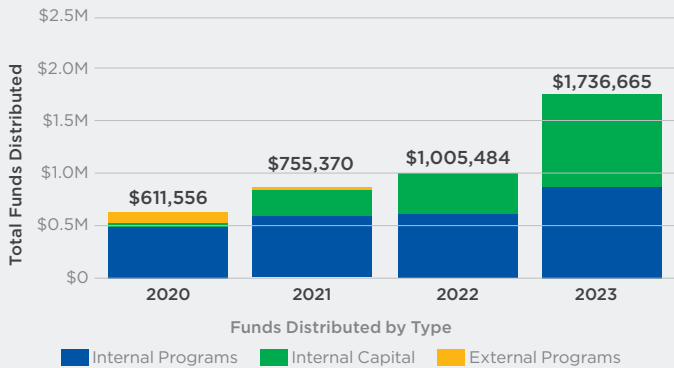
\$ IN MILLIONS



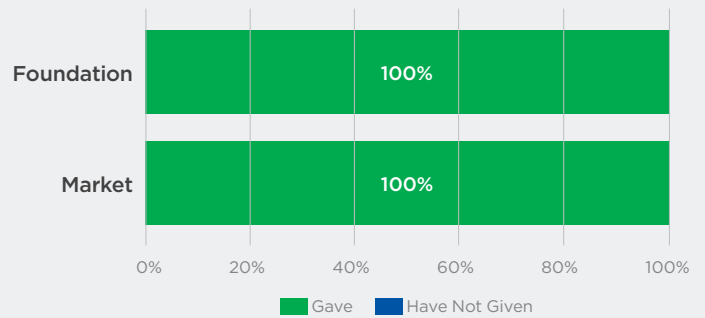
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION





STORIES OF IMPACT

Mercy Health Foundation
Lourdes
Paducah, KY

As a birthing center nurse and a mom who had her baby there, Ashley is grateful for donors who keep the unit well-equipped for newborns.

New birthing center equipment kept baby Lennox safe and comfortable

Ashley Lawson is a nurse who helps deliver babies at Mercy Health — Lourdes Hospital. She works in the special area that was renovated with the help of donors. When Ashley had her second child, Lennox, she became a patient herself and it changed how she saw things.

“Working as a labor and delivery nurse and seeing what we do every single day with our patients is something that I didn’t experience with my first baby,” says Ashley. “It made a big impact on my experience with Lennox’s birth.”

Ashley was part of a team that selected new equipment for the unit, like state-of-the-art bassinets and giraffe warmer incubators, that were purchased with donated funds.

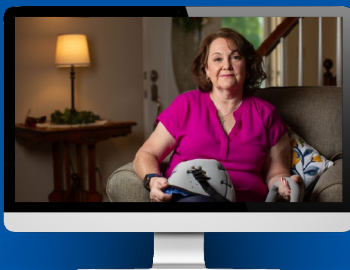
“Everyone considered, if we were a patient, what would we want to have available?”

During her stay with Lennox, Ashley saw that equipment in action. She says the giraffe warmer made a big difference in providing comfort for both baby and mom.

“Lennox got everything done in the giraffe warmer in my room, all in one safe, comfortable place.”

She knows the feeling of comfort is due, in large part, to donors.

“Without your gift, I don’t know if we would have been able to get the warmers and bassinets. I definitely knew we were both safe during the most vulnerable moment of my life.”



WATCH: Donations for cold caps allowed Patty to keep her hair during cancer treatment.



Click or scan the QR code to hear about Patty’s experience

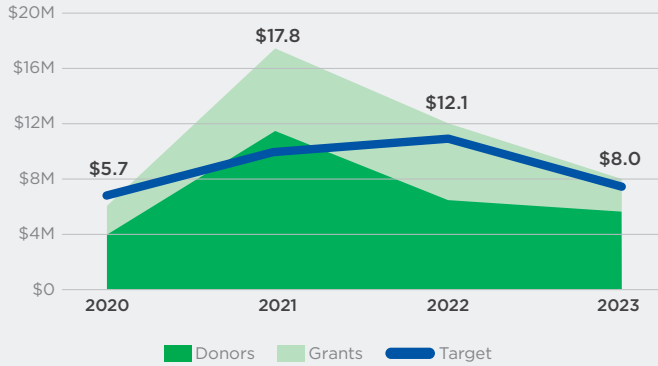


Bon Secours Richmond Health Care Foundation

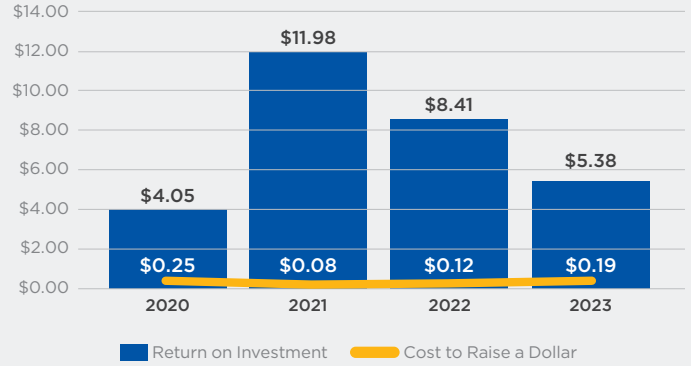
Richmond, VA

REVENUE & TARGET TREND

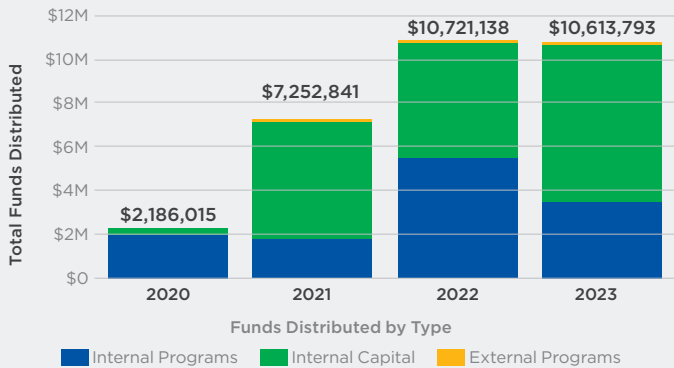
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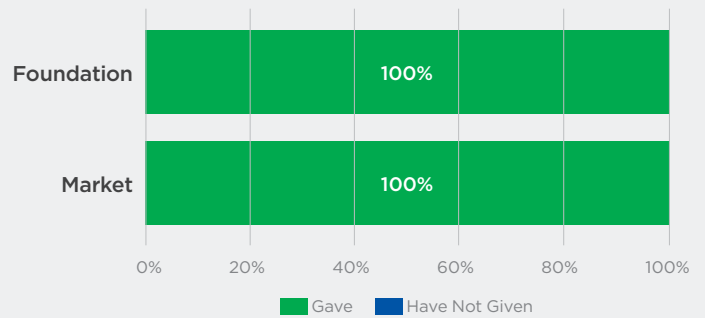
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



Stan has a second chance at life after cardiac arrest, thanks to donors

It started as a normal morning for Stan and Tammy Edwards. Tammy went shopping for a new porch swing and Stan went for a bike ride. However, their lives would soon completely change.

After suffering cardiac arrest, Stan says he was blessed – first by bystanders and EMTs who rushed to his aid – and then by landing at Bon Secours St. Mary’s Hospital for treatment.

Stan spent most of his 33-day stay at the CCU and CVSU in a medically induced coma. During that time, Tammy experienced an unparalleled level of support.

“From the moment we arrived, I felt like his best interest was at heart,” she recalls. “They supported me through the most difficult thing I’ve ever been through and seemed to care for me just as much as they were caring for my husband.”

Stan credits the donors who support the cardiac specialty unit for helping him get back on his feet. He was able to complete his 26th marathon and started training for his next Ironman triathlon just 15 months after he left St. Mary’s. Stan and Tammy are grateful for everyone who helped him have a second chance at life.

“I don’t know how else to say it. The funding and resources you provide so the doctors and nurses can do what they do literally saved my life.”

Donations for the cardiac specialty unit made a life-saving difference for Stan Edwards when he had a cardiac arrest. Now he’s back to competing in marathons and Ironman triathlons.



WATCH: Chemo didn’t cause Polly to lose her hair, thanks to new donor-funded technology.

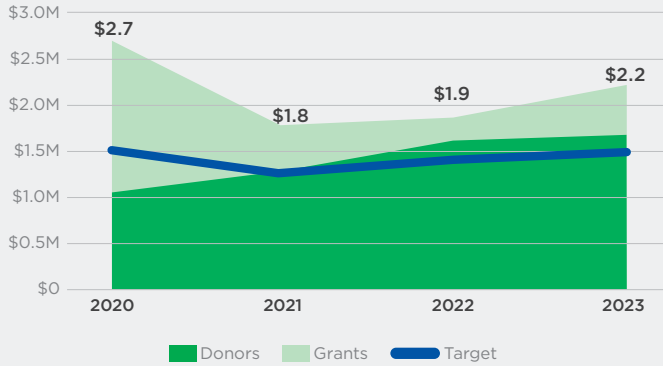


Click or scan the QR code to hear how cold caps helped Polly

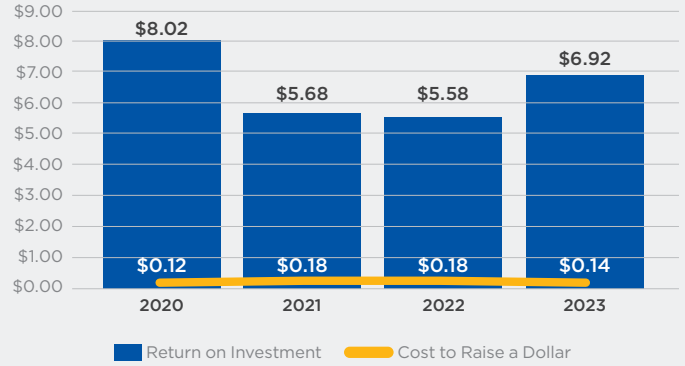
Mercy Health Foundation Clark & Champaign Counties Springfield, OH

REVENUE & TARGET TREND

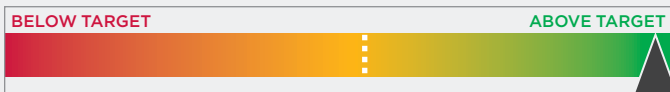
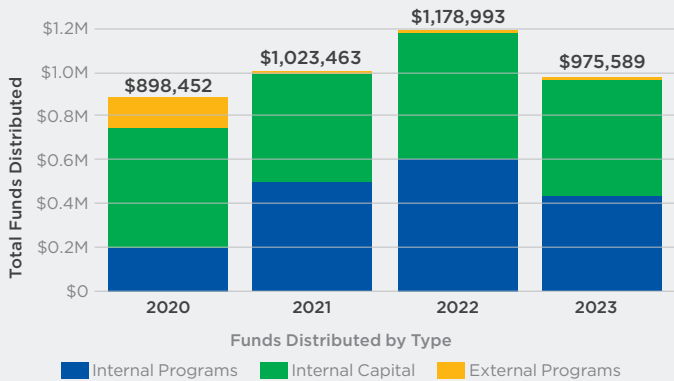
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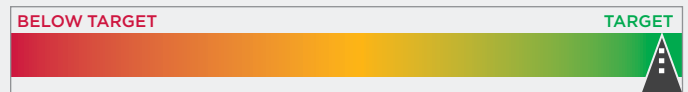
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



STORIES OF IMPACT

Mercy Health Foundation Clark & Champaign Counties

Springfield, OH

The intensive cardiac rehab program, funded by donations, helped Diana feel better and stronger after a heart attack and surgery.



Diana regained her energy after a heart attack, with help from donors

When Diana Vanhoose suffered a heart attack, she was terrified.

“I thought a heart attack was a death sentence,” she recalls.

After her heart damage was repaired at Mercy Health – Springfield Regional Medical Center, Diana was still dismayed at how she felt.

“When I first got out of the hospital, I had a hard time getting going,” she says. “I was very tired. I thought this was what the rest of my life was going to be like.”

Fortunately for Diana, donors support the intensive cardiac rehab program her doctor recommended to learn diet and exercise changes for better long-term outcomes.

Diana immediately began participating in the program that was offered nearby.

“Being in Urbana, it’s only five minutes from my home so I have no problem coming three times a week,” she says. “If it was out of town, I doubt I could go.”

Diana now has more energy and appreciates the donors who have helped her adopt a new healthy lifestyle.

“I feel so much better with the exercise than I did before I came. Without this program, I don’t know where I would be right now. It has been a lifesaver for me.”



WATCH: A Watchman device protects Roger from another stroke.

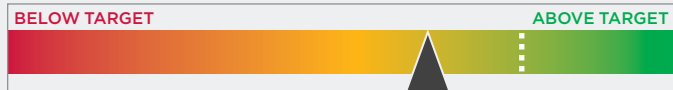
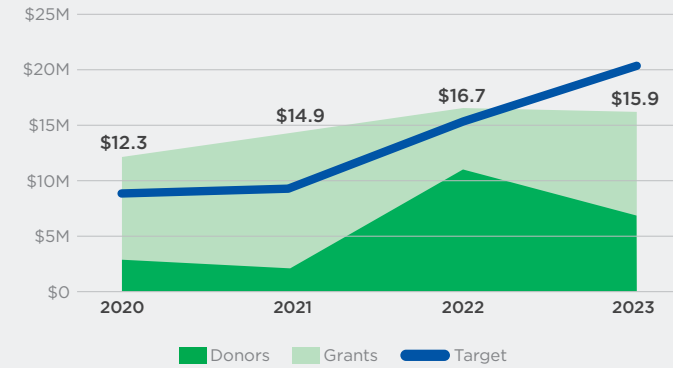


Click or scan the QR code to hear from Roger

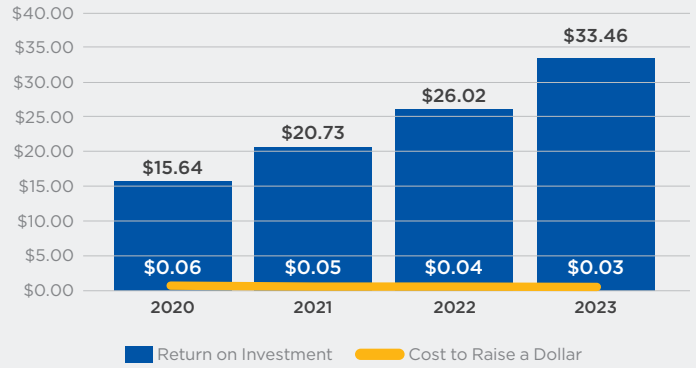
Mercy Health Foundation Toledo, OH

REVENUE & TARGET TREND

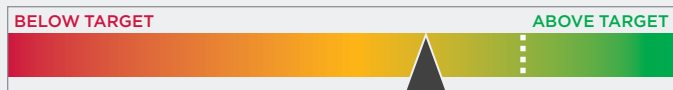
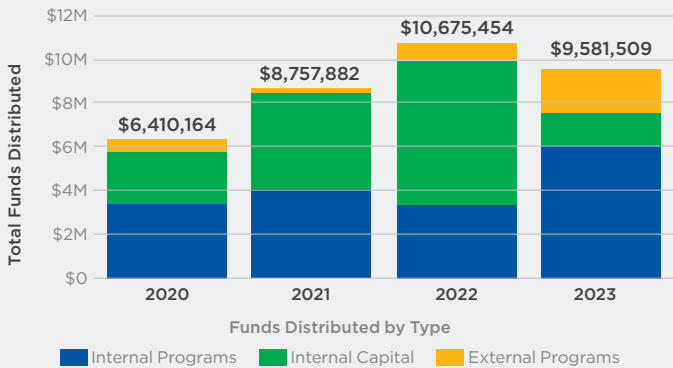
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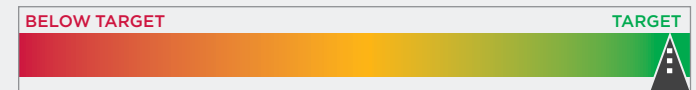
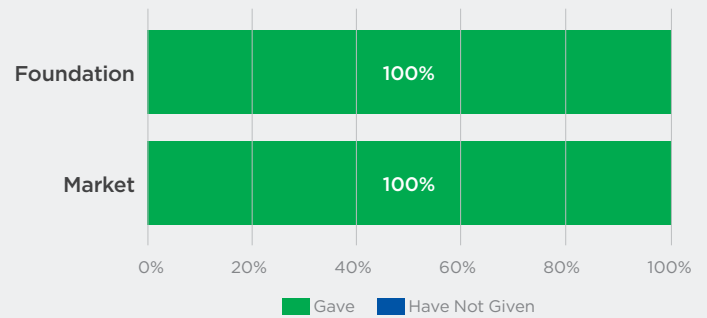
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



STORIES OF IMPACT

Mercy Health Foundation
Toledo, OH

Simone has her own apartment and health care to manage her chronic illness, thanks to Mercy Outreach Program donors.



Donors gave Simone help and hope when she was homeless

Simone Jasch grew up wanting to be a dancer. She was living her dream by studying dance in college when disaster struck. She began experiencing balance and neurological issues. They progressed to where she eventually required a wheelchair.

More recently, misfortune struck again. Her fiancée passed away from COVID and she ended up in a homeless shelter. Suddenly she had no career, no family and no hope.

Fortunately, donors were there for Simone by supporting the Mercy Outreach Program to help those suffering from chronic illnesses.

“I learned about Mercy Outreach when I was living in the shelter. They helped me connect with the doctors I needed to get a correct diagnosis and helped me with housing.”

Simone says she is excited about the path her life is on now. She lives in her own apartment and is even connecting with local church services through Mercy’s spiritual health team. She credits Mercy Health Foundation donors for providing the support that was a lifeline for her when there seemed to be no other hope.

“Thank you for allowing all the services to be helpful for me to be able to live and have a life that I am happy to have.”



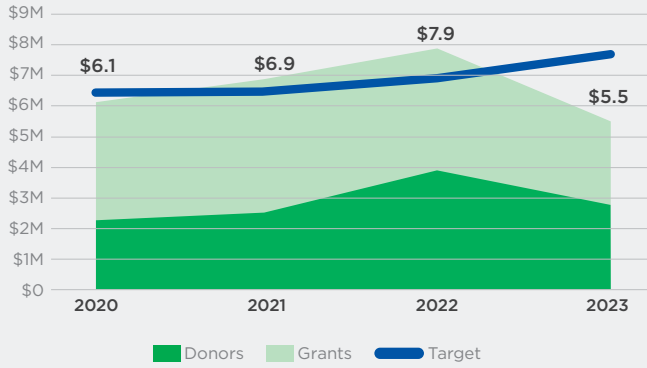
WATCH: Terrie’s breast cancer was discovered by 3D mobile mammography.



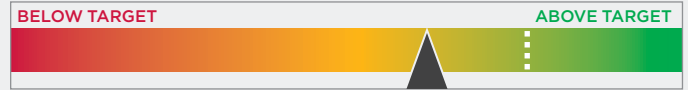
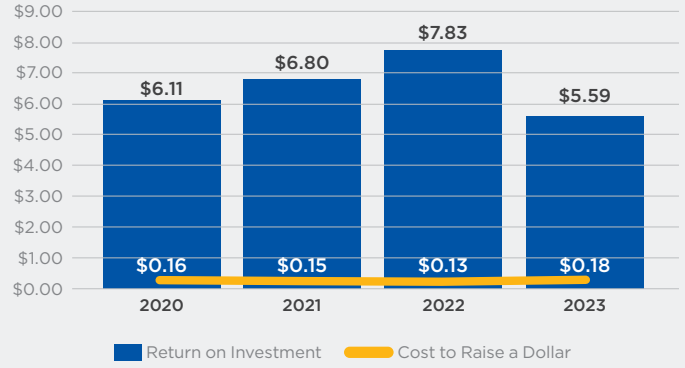
Click or scan the QR code to hear from Terrie

Mercy Health Foundation Mahoning Valley Youngstown, OH

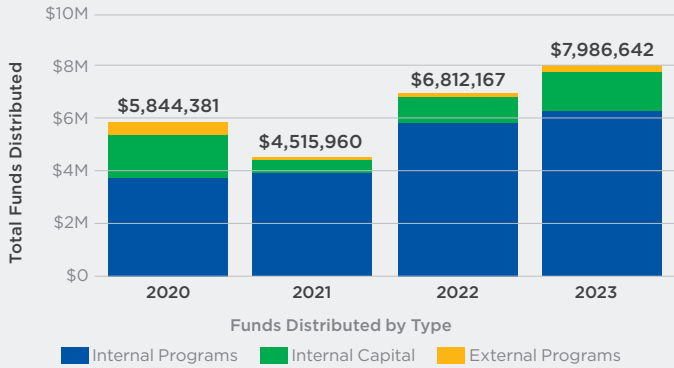
REVENUE & TARGET TREND \$ IN MILLIONS



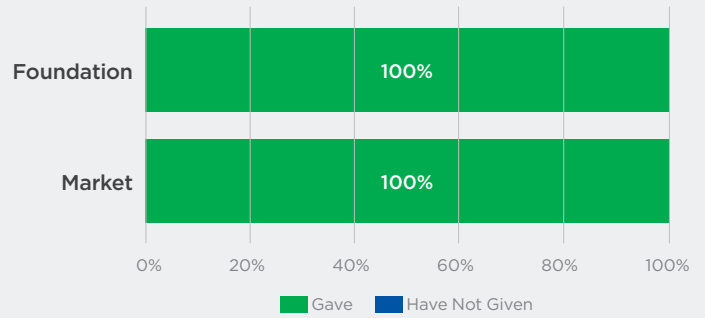
ROI AND COST TO RAISE A DOLLAR



PHILANTHROPY SUPPORT (FOUNDATION DISTRIBUTIONS)



BOARD GIVING PARTICIPATION



Donors helped Debbie beat breast cancer

It was a cold and snowy day when Debbie Fay almost postponed her annual checkup. Luckily, she didn't. During the exam, the doctor discovered a lump in her breast.

The very next day she was at the Joanie Abdu Comprehensive Breast Care Center (JACBCC) for a mammogram. That led to a sonogram and then a biopsy — all in the same day and in the same location.

Because of Mercy Health Foundation Mahoning Valley donors, Debbie got the care and life-saving treatments she needed to beat breast cancer. And she is forever grateful.

“Donors who support Joanie’s Promise or the Joanie Abdu Center cannot know how much it means to survivors, fighters, warriors and the future generation. Please continue to contribute because there are advancements that are directly related to the funds that come in.”

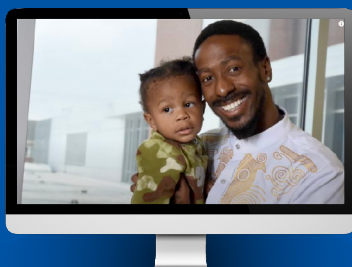
When Debbie was first diagnosed with breast cancer she was worried it would beat her. Then a friend reminded her, “You’ve got this. You’re one tough cookie.”

The friend even sent Debbie a meme — a chocolate chip cookie with arms in a fighting stance, a pink bow and a chomp out of her head.

“That’s me,” Debbie laughs. “I always wear a pink bow and they took a chomp out of me for the breast cancer.”

But just like the cookie meme, Debbie is a fighter. She beat breast cancer thanks to our donors and the care available at the Joanie Abdu Comprehensive Breast Care Center.

All the tests and treatments Debbie Fay needed to win her fight against breast cancer were available at the Joanie Abdu Comprehensive Breast Care Center. She’s grateful for donors who support these services that saved her life.



WATCH: Donations for the Fatherhood Support Program help Flight learn how to be a great parent.



Click or scan the QR code to hear from Flight

Glossary

Revenue / Total dollars raised

Revenue / 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.

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.

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.

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** **retired March 2024*

Charleston, SC Market Foundation President – **Stacy Waters**

Cincinnati, OH Market Foundation President – **Missy Hendon Deters**

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

Hampton Roads, VA Market Foundation President – **Carrie Miller** **as of August 2024*

Irvine, KY Market Foundation Director of Development – **Kathy Withers**

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**

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, Data Solutions – **Teresa Dick**

Director, Funder Solutions – **Manda Rice**

Director, Operational Performance – **Amanda Baird**

Director, Prospect Research & Analytics – **Rachel Du**

System Director, Board Relations – **Becky Sittason**

System Director, Grants – **Alice Parisi**

Director, Market Foundation Strategic Initiatives – **Jon Labbe**

Thank you, 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. Special thanks to these companies that were BSMH Foundation Mission Partners as of December 31, 2023.



THANK YOU, 2023 Sponsors!

The second annual **Golf Invitational** raised an incredible \$1.3 million during the two-day event at The Sanctuary Golf Resort on Kiawah Island in South Carolina. Nearly 100 guests attended, representing 31 sponsors, 20 golf teams, 79 golfers and executives from BSMH and the BSMH Foundation.

Besides golfing, guests were entertained with receptions, activities like yoga and a dolphin cruise, a hospitality gifting suite, dinners including a live auction and entertainment by a master mentalist. Guests also attended an educational session with BSMH executives where leaders shared emerging trends in health care and how philanthropy helps BSMH stay positioned for growth opportunities and challenges in the industry. Topics included supply chain, new business development, innovation, digital strategies and more, reflected through the lens of BSMH's guiding Christ-centered Mission.



Click or scan QR code to watch video highlights from the 2023 BSMH Foundation Golf Invitational

Third Annual
**Bon Secours Mercy Health
Foundation Golf Invitational**

September 23-25, 2024
TPC Sawgrass, Ponte Vedra Beach, Florida

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