



TO OUR DONORS

We want to start off this edition of *Giving Matters* with a sincere thank you. You have been so generous to Providence St. Mary Medical Center, and the patients and community we serve, during one of the most troubling years in recent history. Thank you for making our Foundation your philanthropic priority.

Despite the challenges of 2020, we were able to do so much to support the health needs of our community, including:

- Funding an important expansion of cardiovascular services to treat patients with irregular heartbeats. The Peter Allan Electrophysiology Lab will provide care for thousands of patients in the coming years.
- Supporting COVID-19 response efforts by purchasing Cepheid test processing equipment. This enabled us to process COVID-19 tests onsite, same day, for patients and caregivers.
- Establishing an Emergency Response & Recovery Fund.

We hope to get to the other side of the pandemic soon. With increased vaccine distribution, it seems possible that it will be better managed by the end of 2021.

We are proud that Providence St. Mary is leading the way to create healing in the community this year both inside and outside our campus. We've launched the Help is Here initiative, funded by philanthropy, focused on our youth who have been greatly impacted over the last year. What a great opportunity to connect with young minds to instill hope and resilience. We encourage you to read more about this program on page 4. Internally, we continue to support our caregivers by providing healing experiences like visits with therapeutic mini ponies! We are ready to celebrate the even stronger Providence St. Mary family that now exists.

With gratitude,

Jeanette Gehrke, EdD

Jeans & Select

Chair, Foundation Board of Directors

John Kozyra

John Kozyra

Chief Philanthropy Officer

Board of Directors

Officers

Jeanette Gehrke, EdD, Chair Margaret Curran, Vice-Chair

Members

Peter Allen
Larry Bird
Diana Carloni-O'Malley
Frecia Johnson
Scott Nassif
Rick Piercy
Cindy Toms
Rosanne Smith
Steve Stewart
Elizabeth Walker
Mark Yates

Emeritus board member

Glee Heikes

GIVING MATTERS MAGAZINE

Published by Providence St. Mary Medical Center Foundation

Editors: Janene Benjamin, Regional Director, Donor Relations and Rachel Bedoya, Regional Manager, Foundation Messaging

Providence St. Mary Medical Center Foundation: 18300 Hwy. 18, Apple Valley, CA, 92307 supportstmaryfoundation.org/givingmatters

If you would like to be removed from the *Giving Matters* mailing list, please contact us at the address above, at 760–946–8841 or StMaryFoundation@providence.org.



COVER STORY

The Joy of Living Is in the Joy of Giving

Charitable Gift Annuity

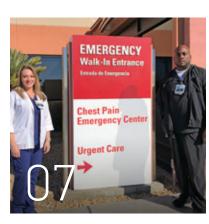
TABLE OF CONTENTS



FUNDRAISING UPDATEHelp is Here Campaign Boosts
Suicide Prevention



ANNUAL REPORT
Your Impact



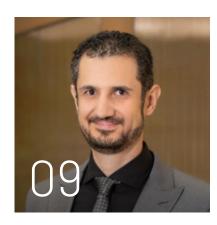
CAREGIVER PERSPECTIVE

A Look Back on a Year Like

No Other



PLANNED GIVING
Giving Through Your Will
or Living Trust



PHYSICIAN PROFILE
Meet Our New CMO



THE JOY OF LIVING IS IN THE JOY OF GIVING

Remembering the remarkable life of graceful Glee Heikes

01

Glee Heikes passed away five months ago, but her memory remains vibrant, especially among those who knew her and her late husband best. Originally from Washington state, she moved to the High Desert with Hanley, or Hike as friends called him, in 1966. Together, they owned and operated Heikes Cadillac-Oldsmobile-GMC-Datsun in Victorville.

Back then, Apple Valley was a small community of several thousand where everybody helped each other and, of course, Glee stood out. Her grace and refined style were apparent, and she always wanted to help others. She

especially impressed Tami Doran, caregiver at Providence St. Mary Medical Center and the daughter of an eye doctor who lived near the couple. As a child, Tami would babysit the Heikes' dogs, Red 1 and Red 2, and help them with dishes and polishing silverware when they threw parties. She and her brothers always thought the Heikes were rich because they stocked several flavors of expensive Dreyer's ice cream in their freezer. They'd only have little bites when they would babysit the dogs though, as Tami recalls with a chuckle, so it wouldn't look like they ate too much.

As the years went by, Tami and Glee became close friends. "We were friends long before I knew of her involvement with the hospital," shared Tami who acknowledges that she, like many others, was in awe of Glee. "She and Hike were concerned about everybody in the community. They knew a lot, cared a lot and gave a lot," she said.

Tami credits Glee with inspiring her as a child, and being a positive force in the community. "She was very refined, a total lady head to toe." Glee's support of Providence St. Mary was legendary and when Tami became a nurse at the hospital, Glee was extremely proud. When Tami won the Paladugu Award, a nursing recognition award at Providence St. Mary, Glee made sure to attend the award presentation.

Glee touched many lives in this way, including that of longtime major gift officer with the Foundation, Lezli Roberts. They met when Glee joined the Foundation board in 1995 and became enduring friends. "Glee's and Hike's lives were encapsulated by one of their favorite sayings: The joy of living is in the joy of giving," Lezli recalled. "They lived that mantra together every day." Hanley was clearly the love of her life. Even after his passing in 1993, she would share updates on the hospital and community with the photos of him in her house.

"She always wanted to help," said Lezli. Glee and Hanley were instrumental in shaping the valley so she knew many business owners and civic leaders. She would reach out to them for gifts and advocate for Providence St. Mary. She was also instrumental in helping recruit board members. "When Glee walked into a room, she was like a magnet. Everyone would come up and speak with her," Lezli remembered. "She planted seeds of giving within her circle of friends and those grew into generous support for the work of the Foundation." Lezli has been with the Foundation for more than 25 years, so they



Many years, many tears and many laughs.

- Glee Heikes



shared many wonderful memories. One way she is honoring those memories is to continue planning a new program that Glee was incredibly passionate about — the Emeritus board program — that will honor past Foundation board members.

Glee and Hanley believed in philanthropy and in leaving behind a legacy. In fact, she was key in raising more than \$7 million for the hospital in estate gifts and millions more in special campaigns. They created a charitable gift annuity themselves, and made an estate gift that will fund the new chapel at the hospital campus in Victorville. The Hanley H. Heikes Legacy Society was established as a way to recognize, honor and thank those who have named the medical center as a beneficiary in their estate plans.

Glee was 97 when she passed away. Although a car accident made her final years more difficult, she always found joy in connecting with friends. As she shared in a note to her friend Lezli, "Many years, many tears and many laughs." Randy Castillo, Providence St. Mary Medical Center chief executive, speaks for us all when he says, "During my time here, Glee became very special to me and I will truly miss her. She did so much for our community and Providence St. Mary that we all will benefit for years to come." You can watch a virtual tribute for Glee and Hanley, learn about their legacy and be inspired by two lives lived for others by visiting supportstmaryfoundation.org/CelebrateGlee.

FUNDRAISING UPDATE PLANNED GIVING

CHARITABLE GIFT ANNUITY

Gift property to the foundation. Donor receives contract for guaranteed annuity payments. Income tax deduction of \$4,684 may save \$1,070.

Cash \$10,000

Annual payments of \$650 will be received monthly, quarterly, or annually, with \$570.70 tax-free, for an effective payout rate of 9.1%. Principal \$10,000

(6.50% Annuity, One Life for an 80 Year Old)

Monthly payments for one life. Property passes to the foundation with no probate fees. There are also no estate taxes.

Providence St. Mary Medical Center Foundation \$100,000

(Approximate Value)

Rates vary by age. Contact Philip Barker, executive director of estate and gift planning, for a personalized illustration based upon your age and prospective gift amount. There is no cost or obligation. This educational illustration is not professional tax or legal advice; consult a tax advisor about your specific situation.

Giving through a gift annuity

Gift annuities are popular because they give you cash back at attractive, fixed rates for life. Gift annuities are easy to understand, easy to fund and easy to enjoy. You make a gift to the Foundation of cash or other assets such as stock or real estate. You receive an immediate charitable tax deduction for the gift and avoid payments to you or you and your designated

beneficiary for life. Each payment will be fixed, and the amount of each payment will depend on the age of the donor or donors when the gift is created. After all payments have been made, the remaining portion of your gift goes to support our mission. It is possible to receive an even higher annuity payment by making the gift capital gains tax if applicable. We will then make now and deferring to receive annuity payments later in life, such as when you retire.

For more information about the charitable gift annuity strategy, please contact Philip D. Barker, JD, CFRE, executive director of estate and gift planning, at Philip.Barker@providence.org or 714-347-7900.

HELP IS HERE CAMPAIGN **BOOSTS SUICIDE** PREVENTION

Providence St. Mary Medical Center is launching a new mental health initiative for High Desert youth with the express goal of preventing suicides in the region.

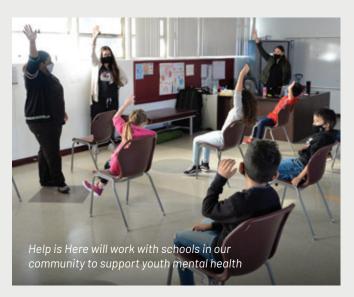
Providence St. Mary Medical Center Foundation recently secured a grant that will fund the program through December 2021. Titled Help is Here, it aims to connect youth to local resources and muchneeded mental health services in the High Desert.

"At Providence St. Mary, we deeply care about the well-being of our youth in the High Desert and want to do everything possible to support their growth and future opportunities," said John Kozyra, chief philanthropy officer. "The campaign is one way we are reaching out to support the health and wellness of our community."

The campaign, launched in March, has a major goal - breaking the stigma surrounding mental illness, particularly suicidal ideation.

"By understanding what students and families are requesting help for, we can customize the help and engage students in their own voice," said Kevin Mahany, director of community health investment for Providence St. Mary.

National data indicates that suicide remains the second leading cause of death for young teens in the U.S. Recent reports show that rates of anxiety and depression are on the rise among young ones amidst an ongoing pandemic and related shutdowns.



Mental health care for children in San Bernardino County has grown, but a sizable gap remains between those receiving help and those who still need it. This gap can often be one of the largest barriers in youth receiving the assistance they need.

Help is Here will work with community programs aimed at closing that gap. Providence has also developed its own free school program, Work to be Well, that is student-led.

"We are seeing local schools organize their students into advocates," Mahany said. "It's exciting to have students flex their voice as to what they want and need in today's world."

Help is Here will also focus on shifting the perception around mental health care. A key message is ensuring youth know that talking about mental illness, even suicide, is okay and that it's fine to seek help if needed.

"We want students to help drive how mental health is affecting them in today's world," Mahany said.

By working with community leaders and partners, Help is Here will ensure all High Desert youth will know help is closer than they think.

To support our mental health initiatives, please visit supportstmaryfoundation.org/donate.

YOUR IMPACT

Through your generosity, \$4,583,184 was raised in 2020 to enhance patient care at Providence St. Mary Medical Center. More than 754 donors made 8,485 gifts.



I am so grateful for the donors that make Providence St. Mary a personal priority. Philanthropy is so critical to our mission to serve the High Desert community. We simply cannot do as much as we do without donor investment.

- Randy Castillo, Chief Executive



\$334,513

Electrophysiology Lab

Expanded the cardiac program with this innovative facility containing advanced technology used to monitor and treat heart rhythm problems, commonly known as arrhythmias.

\$172,311



Cepheid GeneXpert XVI

Enabled onsite COVID testing delivering patient results within the same day and/or next day — prior, it was taking nine days.



\$61,900

COVID-19 Support: Emergency Response and Recovery

Hands-on assistance within various units, acquired a new security truck and provided phone chargers to ensure communication between patients and their families.

COVID-19 Support: Caregiver Wellness

Delivered 1,000 meals, 37,281 pieces of personal protective equipment, thousands of hygiene supplies and uplifted caregivers on the front lines with miniature therapy horse visits.

CAREGIVER PERSPECTIVE PLANNED GIVING

A LOOK BACK ON A YEAR LIKE NO OTHER

As COVID-19 continues to impact the High Desert community, the caregivers at Providence St. Mary Medical Center have found themselves on the front lines for more than a year. Through generous philanthropic support of the Emergency Response and Recovery Fund, the medical center has been able to meet the extraordinary demands brought about by the pandemic. Two caregivers — ICU nurse lead Lindsay Packard, RN, and ER charge nurse Jahmaal Willis, RN — shared their experience.

From the time she was a little girl, Lindsay knew she was destined to be a nurse. "Nursing has always been where my heart is," she said.

Jahmaal describes his work as a calling. "My wife tells our five kids, 'Your dad is a superhero. When he puts on his scrubs, he goes to work and saves lives.' That's a lot to live up to," he laughed.

But neither nurse knew the heroism their roles would require as the coronavirus emerged and quickly reached pandemic proportions. The first months were marked by uncertainty and rapidly evolving protocols. "It was scary because it was something new to the community," explained Jahmaal. "We didn't know what to expect."

It soon became clear what they were up against. Both Lindsay and Jahmaal recall a harrowing day last fall when the ER and ICU were well above maximum capacity. Ten patients went into cardiac or respiratory arrest, two of them simultaneously. Lindsay performed so many chest compressions that day, her hands became callused.

Meanwhile, Jahmaal himself contracted COVID-19 and spent four months recovering at home. Despite the severity of his symptoms, he refused admittance to Providence St. Mary because he didn't want to take up valuable bed space.



Despite the ongoing tragedy of the pandemic, both nurses consider the hospital — and themselves — changed for the better. "I have learned that I have more resilience than I ever thought possible," reflected Lindsay. "It's okay to break down when you need to. Sometimes my team needs to see and feel that from their leaders. Then I can pick myself up and get strong again."

"It's brought us closer together as an entire team," Jahmaal added. "People who share traumatic experiences have a stronger bond — even among different departments. Now we rely on each other and interact more. We have a greater appreciation for every single department. And it makes us stronger as a hospital."

Both remain deeply grateful for their community's support of the hospital during this extraordinary time. "The outpouring of donations and supportive drive-by events has been incredible," said Lindsay. The Foundation provided beanies, cards and meals to caregivers throughout the pandemic thanks to community generosity.

Even behind his N95 mask, Jahmaal's smile was visible. "I'm so thankful to be a part of this community."

To make a philanthropic gift to the Emergency Response and Recovery Fund in honor of caregivers like Lindsay and Jahmaal, please visit supportstmaryfoundation.org/donate.

YOUR LEGACY SAVES LIVES THROUGH COMPASSIONATE CARE

We know how much you care for your loved ones and the peace of mind that comes in keeping your will and trust up to date. Providence St. Mary Medical Center can also benefit from your planning. A gift in your will and trust creates a lasting and personal legacy and helps us serve others. Here are a few of the benefits of a bequest:

Giving through your will or living trust

Your gift will have a significant impact.

Direct your bequest to any area of Providence St.
 Mary Medical Center and create a legacy that will
 help us keep pace with advances in health care
 innovations and technology while responding to
 the unique needs of our community.

A bequest is flexible.

• You can use a wide range of assets to make your gift and create a highly personalized plan.

You control your assets.

• You can modify your bequest if your situation changes.

A charitable bequest may minimize estate tax.

 If you are subject to estate tax, a charitable bequest could reduce the amount of estate tax paid. Additionally, some assets, such as retirement accounts, are heavily taxed when left to heirs and may also trigger an estate tax. A charitable gift funded with these assets bypasses taxation and gives your legacy maximum impact.



The value of a blended approach to giving

Gifts of cash and property also help to further the mission of Providence St. Mary Medical Center. Combination gift options can make your giving go even further. With a blended gift strategy, you can see the impact of giving today and continue your commitment to our mission in the future.

Learn more about planned giving

To learn more about creative ways that benefit you and our mission, please contact Philip D. Barker, JD, CFRE, executive director of estate and gift planning, at Philip.Barker@providence.org or 714-338-9105.

07

MEET OUR NEW CMO

A passionate leader for our ministry's medical staff

Charlie Abraham, MD, MBA, FACP, has joined us as the new chief medical officer at Providence St. Mary Medical Center.
Dr. Abraham brings a decade of experience in health care leadership, most recently with CommonSpirit Health. He was responsible for overseeing the appropriate level of care for patients, the quality of health care, medical necessity and the support and education of attending physicians and staff. Dr. Abraham describes the first three months in his new role as "exciting and challenging," especially in regard to dealing with the pandemic.

Two things made the Providence St. Mary position attractive to him. First is that the hospital is a faith-based, mission-driven organization and he is wired that way as well. "It's about the underserved and health care provision has to be equitable," he stated. The other is the medical center's huge potential. "So much can be done in partnership with the community we serve and they deserve it," said Dr. Abraham.

"I see a promising potential in this opportunity to build something great which would be a benefit in which we all take enjoyment."

Dr. Abraham sees philanthropy as woven into everyone's role at the medical center and looks forward to fostering communication between those at the hospital, especially physicians and the community they serve. To this end, he is eager to engage and empower physicians and build partnerships. "The best and most ideal way we can provide high-quality care for our patients is by getting our physicians more involved," he said.

Dr. Abraham is eager to embrace the opportunity of speaking to donors on a regular basis. "Nothing beats face-to-face meetings, sitting down in the same room and being able to share questions and answers to help us learn more about each other. I really would love that," Dr. Abraham said with a gentle smile.



GIVING MATTERS



18300 Hwy. 18 Apple Valley, CA 92307 Pre-Sorted
First Class
U.S. Postage
PAID
Permit #4554
Santa Ana, CA





Your donation can provide life-saving care to our community. Please visit **supportstmaryfoundation.org/givingmatters** and make a donation.

"WE ARE HERE FOR YOU!"

Our team at the Providence St. Mary Medical Center Foundation builds relationships with individuals and businesses in the community to match donor wishes with the needs of the medical center. We are grateful for the community's generous support over the years. Please let us know how we can help you at 760-946-8841.



Pictured Left to Right:

John Kozyra, Chief Philanthropy Officer (John.Kozyra@providence.org)

Lezli Roberts, Major Gifts Officer (Lezli.Roberts@providence.org)

Susana Vasquez, Donor Relations Officer (Susana.Vasquez@providence.org)

Michael Page, Major Gifts Officer (Michael.Page@providence.org)