

Carolinas HealthCare Foundation

Annual Report 2016



Carolinas HealthCare Foundation



Carolinan HealthCare Foundation

Today, multiple programs and services throughout Carolinas HealthCare System are being supported or significantly enhanced by philanthropy. Children's programs, expansion of our Levine Cancer Institute, new cardiac initiatives, neurosciences research, and behavioral health issues are just a few of the important areas upon which we are currently focusing.

Carolinan HealthCare Foundation has been especially privileged to play a role in developing the vision for Levine Cancer Institute. Changing the way cancer services are delivered in the Carolinas, LCI is impacting the lives of people in communities from Charleston, South Carolina to the mountains of North Carolina. Underscoring the magnitude of this groundbreaking initiative for cancer care and clinical research, Carolinas HealthCare System continues to recruit some of the country's top cancer specialists. In support of this commitment to providing cancer services throughout the Carolinas, our Foundation is dedicated to generating more than \$50 million in capital and programmatic support for LCI in just the next few years.

It's encouraging to watch what can happen when a community pulls together to support excellence in healthcare. Thanks to each and every one of our donors, we are making a difference in the lives of people in the Carolinas each and every day.

Organizational Accomplishments

Leon Levine Foundation Makes Unprecedented Gifts to Support Expansion at Levine Cancer Institute

In April 2016 Carolinas HealthCare System announced a \$25 million commitment from The Leon Levine Foundation to support the significant expansion of Levine Cancer Institute, including \$20 million for infrastructure and \$5 million in programmatic funding. The grant from The Leon Levine Foundation marks its largest to date, as well as the largest single gift in the history of Carolinas HealthCare System.



This funding will support the construction of a seven-floor 250,000 square-foot advanced outpatient center adjacent to the Institute's research and administration headquarters. This will expand hematologic, thoracic, and gastrointestinal oncology programs available in the region. The new facility will also enhance translational research capacity in several specialties and will provide space for continued growth of survivorship programs, supportive oncology, and rehabilitation.

Included in The Leon Levine Foundation's \$25 million commitment is \$1 million benefiting the development of an innovative breast cancer program at Levine Cancer Institute: The Sandra Levine Young Women's Breast Cancer Program. This program will help women under 40 who are diagnosed with breast cancer receive specialized care that will enhance their experience as patients and improve their likelihood of a favorable outcome from their treatments.



James B. Hall Gynecologic Oncology Center

In November 2016, Carolinas HealthCare Foundation announced the naming of the James B. Hall Gynecologic Oncology Center, the result of a \$1 million gift from the Bissell Family honoring Dr. James B. ("Jim") Hall.

Dr. Hall, who developed a close relationship with the Bissell family after providing care to the late Sara Bissell, retired from Levine Cancer Institute in June after a 36-year career as a gynecologic oncologist. He was the first gynecologic oncologist in Charlotte and has been the only Division Director of Gynecologic Oncology in the history of Carolinas Medical

Center's Department of Obstetrics and Gynecology. Dr. Hall's dedication to patients and resident/student education has resulted in national recognition for the Division of Gynecologic Oncology.

Upon his retirement, a \$100,000 endowment (named the James B. Hall, M.D. Endowed Lectureship in Gynecologic Oncology) was also created through generous gifts by the Bissell Family as well as many of Dr. Hall's colleagues, residents, and patients.

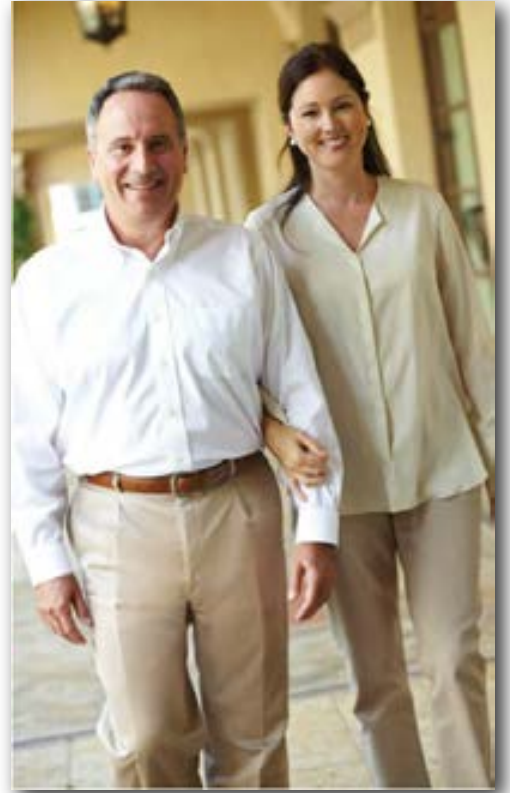
Organizational Accomplishments

Kerry and Simone Vickar Endowed Chair in Hematologic Oncology and Blood Disorders

In 2016, the Kerry and Simone Vickar Family Foundation committed \$2 million to Levine Cancer Institute in support of academic and research efforts. The funds will be designated to establish an endowed chair in their name: The Kerry and Simone Vickar Family Foundation Endowed Chair in Hematologic Oncology and Blood Disorders.

Leading the research and treatment team as the first Kerry and Simone Vickar Family Foundation Endowed Chair is Edward Copelan, MD, FACP who joined Levine Cancer Institute in 2012 from his prior role as head of the bone marrow transplant unit at the Cleveland Clinic. Under his direction, a new, state-of-the-art blood and marrow transplant unit opened in 2014 at Carolinas Medical Center. It is already implementing novel therapies and achieving some of the most successful patient outcomes in the country.

As the need for comprehensive cancer care in the region continues to grow, philanthropic support of the Levine Cancer Institute network by donors such as the Vickars will help ensure that patients have access to the best care available, regardless of where they live.



Donors give Levine Children’s Hospital Kidney Program a “Tune Up”

In October 2016, close to 200 guests turned out for a fundraiser to launch the Pediatric Nephrology Center of Excellence at Levine Children’s Hospital. The event was held at the home of Mary Claudia (MC) and Jeff Pilon, parents to a child who has been impacted by kidney disease. The event raised over \$80,000 for the Center, which also received a lead gift of \$1 million from a generous local donor.

Friends and supporters enjoyed the “Tune Up Your Kidneys”- themed upscale barbeque, complete with music and special presentations by young kidney patients. Father/daughter duo Michael and Jady Eckert awed the group with their story of Michael donating a kidney to his daughter 10 years ago.

Jady’s doctor, Susan Massengill, MD- Director of the Pediatric Nephrology and Hypertension Program –shared the vision for the new Center, which houses a program that has been ranked by US News and World Report as one of the best in the country since 2009. “We have made great progress,” said Dr. Massengill, “The passion and interest is here – and now it’s time to take advantage of that.”

The new Pediatric Nephrology Center of Excellence at Levine Children’s Hospital will promote patient and family-centered care for children impacted with kidney disease by leveraging patient and clinician engagement, clinical research, improvement science and best practices to transform the overall patient experience and quality of life.

Organizational Accomplishments

Tansukh, Sarla, & Rajesh Ganatra Pediatric Cardiology Fund

The Ganatra Family, through The Tansukh, Sarla, & Rajesh Ganatra Pediatric Cardiology Fund, committed \$500,000 to support the new pediatric catheterization laboratories being developed at Levine Children's Hospital. In addition to the advanced technology and procedural benefits these news labs will provide, it is equally important to deliver an extraordinary experience for patients and families with complex congenital heart disease.



The Ganatra family's generous gift will allow our Children's Hospital to become considerably more innovative in its programs serving pediatric cardiac patients and their families, funding advancements such as a 3-D printing laboratory to aid in pre-surgical printing, patient education and physician training. Philanthropic support for such cutting-edge technology will further elevate the hospital's Congenital Heart Center for years to come—a program supported generously by the Ganatras over the last eight years through nearly \$2 million in gifts.

CHS Teammates Give from the Heart

Levine Children's Hospital was built by community support, of which Carolinas HealthCare System teammates are an important part. As a result of the CHS giving campaign, which annually supports Children's Miracle Network and selected other charities, Levine Children's Hospital is able to grow its pediatric specialties, introduce the most advanced patient services, and provide our talented physicians with the latest technology and equipment to deliver world-class care where kids need it most—close to home. Employee gifts in 2016 topped \$1.6 million, making Carolinas HealthCare System the lead contributor, locally, to Children's Miracle Network Hospitals.



Annual Financial Highlights

2016 Summary

Assets

Receivables	\$	38,655
Cash & Investments		269,217
Other		11,735
Total Assets	\$	319,607

Liabilities & Net Assets

Grants & Accounts Payable	\$	2,275
Other Liabilities		1,259
Revocable Funds Managed for others		1,698
Net Assets		314,375
Total Liabilities & Net Assets	\$	319,607

Revenues

Net Contributions	\$	38,609
Net Investment		
Income & Gains		18,239
Total Revenues	\$	56,848

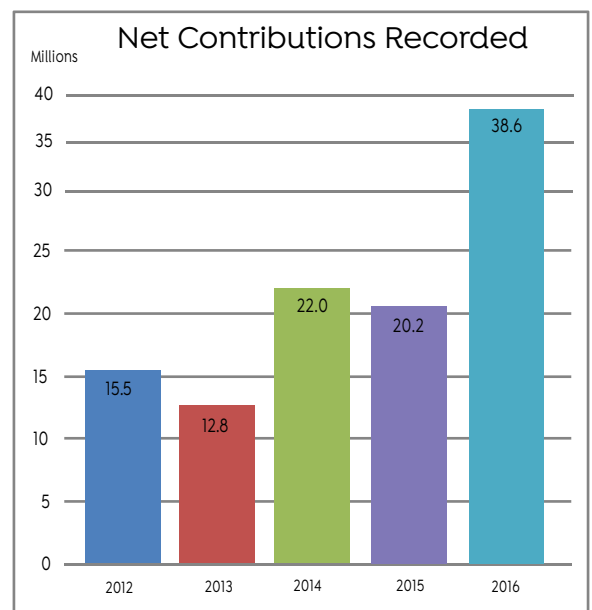
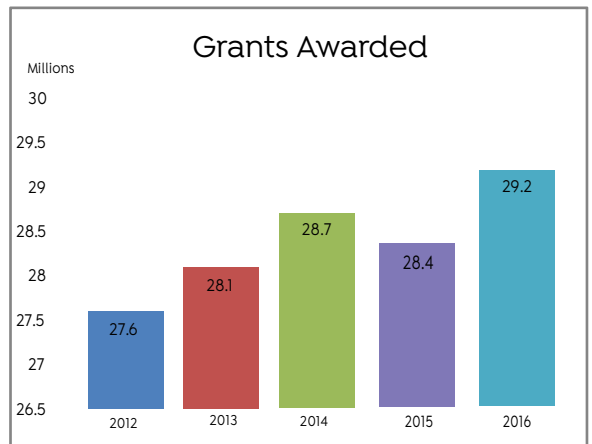
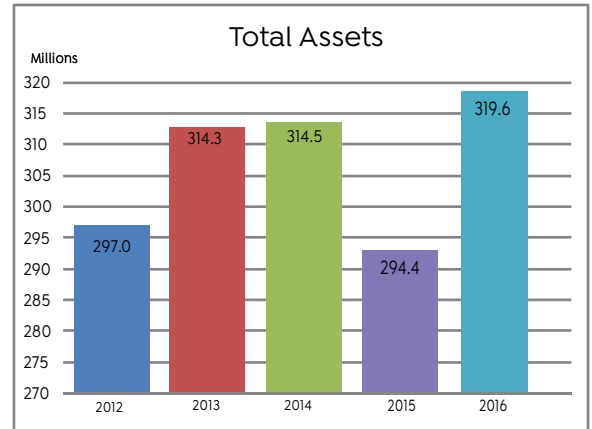
Grants & Expenses

Grants	\$	29,201
General Administrative		1,066
Fundraising		2,180
Depreciation		641
Total Grants & Expenses	\$	33,088

Net Assets

Change in Net Assets	\$	23,760
Net Assets Beginning of Year		290,615
Net Assets End of Year	\$	314,375

2012 - 2016 Summary



Board of Directors

- George E. Battle, Jr.
AME Zion Church, Bishop
- Howard Bissell, III
Bissell, Senior Vice President & Director
- John C. Engler
Merrill Lynch, Retired Executive
- John Georgius, Jr. (Vice Chair)
Private Investor
- David Gitlin
UTCAerospace Systems, President
- Thomas J. Hall
The Hall Group, President
- May Beverly Hemby
Philanthropist & Community Volunteer
- Mandy S. Houser (Secretary)
Shelton Vineyards, Co-President
- James E. S. Hynes
Hynes, Inc., Retired Chairman and Owner
- Luther Lockwood, II
MBL Advisors, Managing Principal
- James E. Mattei
Mattei Holdings, Owner
- Felix S. Sabates, Jr.
FSS Holdings, Inc., Owner
- Lori L. Sklut
Levine-Sklut Family Foundation
- Vicki S. Sutton (Chair)
Paramount Parks-Carowinds, Former CEO