



Philanthropy at Work

*Your Generosity is the
Foundation for What We Do*

JOHN H. DAVIS

CHAIR

BAYSTATE HEALTH FOUNDATION

Dear Friends,



As a lifelong resident and businessman in western Massachusetts, I have come to respect Baystate Health as a remarkable community partner and a business we can all be thankful for and proud to have in our region of the state.

It is an organization committed to quality and innovative care of patients, recruitment of the best physicians, education of new care providers and research projects. It is an organization that thoughtfully and intentionally impacts our region through distribution of services and resources that help the most vulnerable among us. I am impressed by Baystate's ability to not only succeed but thrive, despite an environment that threatens hospitals daily with uncertainties and economic challenges.

Like me, many of you have paused to recognize how grateful you are for a positive experience, expert care, a valuable service, or a caring employee at Baystate. Many of you have taken the opportunity to partner with this community asset by making generous gifts to Baystate Health Foundation to support Baystate's charitable mission, that for years has helped our families, friends and neighbors.

It is always heartwarming to learn of positive experiences and the gratitude people feel because of their relationship with Baystate and to know our community honors their care providers with charitable gifts that provide continued support for their work on our behalf.

This newsletter is a small sampling of the ways philanthropic relationships lead to gifts with significant impact on the services provided to those who trust their health or the health of family members to Baystate in a time of need.

Together we are working wonders.

A handwritten signature in green ink that reads "John H. Davis". The signature is fluid and cursive, with the first letters of each name being capitalized and prominent.

Officers:

John H. Davis

Chair

Mark R. Tolosky

*President and CEO, Baystate Health, Inc.
President, Baystate Health Foundation, Inc.*

Dennis Chalke

*Senior Vice President, CFO
Baystate Health, Inc.
Treasurer, Baystate Health Foundation, Inc.*

Susan Toner

*Vice President, Development
Baystate Health, Inc.
Executive Director
Baystate Health Foundation, Inc.*

Board of Trustees:

Roberta B. Bolduc

Carl E. Breyer, Jr.

Robert S. Cohn

Michael J. Daly

Eric W. Fuller III

Gale A. Kirkwood

Benjamin Liptzin, MD

Joseph D. LoBello

John F. Maybury

Paul M. Opalinski

Judith N. Plotkin-Goldberg

Edward N. Tombs

Brian P. Trelease



**BAYSTATE
HEALTH FOUNDATION**

New Program Launched for **Grateful Patients**

Grateful patients are the cornerstone of the philanthropic program at Baystate Health Foundation. Many initiatives that advance the continuum of care are made possible through the generosity of patients who express their appreciation for a positive experience and outcome by making a gift in honor of their CAREgivers.

To enhance and strengthen this relationship, Baystate Health Foundation is proud to announce Gifts of Gratitude, a formal program designed to identify and refer grateful patients to the Foundation. “The referrals will initiate connections with Foundation staff who will capture the patient experience and suggest ways they can impact health care with a meaningful donation,” says Susan Toner, vice president development and executive director of Baystate Health Foundation. “Gifts of Gratitude creates the opportunity for patients and family members to acknowledge the compassionate, thoughtful and professional care they receive throughout Baystate Health.”

The program invites patients to say ‘thank you’ to CAREgivers, honoring physicians, other clinical care providers and non-clinical staff who have done something special on their behalf. Funds received through the program will be used where the need is greatest and at the discretion of the Foundation.

The Foundation will recognize Gifts of Gratitude honorees with a card informing them a donation was made in their honor and a custom-designed lapel pin. Honorees will also be recognized in the presence of peers and in publications such as *Connections* (Baystate’s employee newsletter) and *Philanthropy at Work*.

To learn more about the Gifts of Gratitude program, visit baystatehealth.org/giftsofgratitude. ■

**BAYSTATE
HEALTH**

Rays of Hope Center for Breast Cancer Research Named for Longtime Support



Photo Courtesy of Julie Ann Blonia

Since its inception in 1994, Rays of Hope – A Walk Toward the Cure of Breast Cancer has supported breast cancer research on a local level, funding projects at Baystate Regional Cancer Program’s Comprehensive Breast Center and the Pioneer Valley Life Sciences Institute (PVLSI). This year, through a grant of \$300,000 per year for five years, the previously designated Breast Cancer Working Group at PVLSI will be renamed the Rays of Hope Center for Breast Cancer Research in recognition of the support of Rays of Hope.

The center will be co-directed by D. Joseph Jerry, PhD, scientific director of the PVLSI and Dr. Grace Makari-Judson, medical director of the Comprehensive Breast Center. The group includes over 40 investigators affiliated with PVLSI, University of Massachusetts – Amherst and Baystate Medical Center.

While prior funding each year from Rays of Hope, which is dispersed through Baystate Health Foundation, was granted to a wide range of research projects, the new award will define a focus for the group. This major research plan will coordinate efforts of many investigators through a strengthened infrastructure designed to support translational research and capitalize on existing talents in the Pioneer Valley. ■

Caring for Pediatric Cancer Survivors



Last fall the Sadowsky Center for Children, the Pediatric Hematology/Oncology clinic at Baystate Children's Hospital, received two significant donations totaling over \$170,000 to help grow its Late Effects program. There are more than 350,000 long-term survivors of childhood cancers in the U.S. today. Unfortunately the very therapies that saved their lives may cause long-term complications.

"Late effects" can be growth delays or reproductive problems. "Establishing a Late Effects clinic to extend care to our patients beyond their primary cancer therapy will have a dramatic impact on their survivorship and quality of life," says Dr. Satkiran Grewal, chief of Pediatric Hematology/Oncology.

"We were extremely fortunate to receive generous donations from *Hyundai Hope on Wheels* and *Children's Miracle Network Hospitals A Walk in the Park/Six Flags New England* to make our Late Effects program a reality." The program will benefit patients like Emilia "Mimi" Lapierre pictured above who will complete her treatment for leukemia in November 2011. When asked about the hospital, Mimi's mother, Katarzyna Lapierre, says, "Baystate Children's Hospital truly is like a family; people get to know your story, not just your chart." Mimi will be the ambassador for the 2011 Walk on June 12. ■

A Generous Gift Creates a Legacy of Support



Over the last decade, Art Stein was a familiar face in the Oncology unit at Baystate Franklin Medical Center, accompanied by his wife Margaret, or daughters Danda or Jenny. Despite his prolonged illness, Art remained upbeat throughout, retaining his trademark smile, wit, and his enlightened curiosity about the world around him. A noted architect and an accomplished poet, Art could chat about almost any conceivable subject, and his visits with the oncology staff would invariably include his favorite request from the menu, apple pie a la mode.

Art's valiant struggle with plasma cell leukemia ended on September 30, 2010. In gratitude for the loving care he had received at Baystate Franklin throughout his illness, Margaret, Danda, and Jenny created the Art Stein Fund with Baystate Health Foundation to support the work of Baystate Cancer Services and Oncology care at Baystate Franklin.

Establishing this endowment was especially meaningful for the Stein family because Margaret was wrestling with her own terminal illness. "*The Art Stein Fund* is a blessing to our department," said Naomi Bolognani, manager of Oncology at BFMC. "Income from the fund will help us meet unbudgeted staff and patient needs and will be a lasting tribute to a lovely, gentle man admired by all of us."

In early February 2011, Margaret, an emeritus professor of Art at Greenfield Community College, passed away. With her husband of 60 years she had shared a love of gardening, art, travel, and the Connecticut River valley where they settled in 1953, built their home, and raised three daughters. Those who knew Art and Margaret think of them still—working in their gardens, composing verse, skiing the black-diamond trails of Thunder Mountain, and creating art in their studio—living life with passion, discovery, and adventure. "Through Margaret's inspired philanthropy, the Steins have created a legacy of support that will benefit others for years to come," said Douglas Reid, Major Gifts officer, Baystate Health Foundation. ■

Circle of Giving



Ashley Gravel is a student at BMC's Perinatal Diagnostic Center this semester. She is also the daughter of a volunteer leader for Baystate Mary Lane Hospital, Jill Gravel, who serves through organization of and participation in fundraising events and encourages community members to follow her example by supporting Baystate through planned gift vehicles.

Ashley says of her clinical rotation at Baystate Medical Center, "I absolutely love it. The staff there is unlike any other staff I've had the opportunity to work under during my other clinical rotations. Everyone is incredibly helpful and friendly, and the sonographers and doctors are generous with the time they take to teach me."

Baystate Medical Center has a long history of educating students across the continuum of care as they pursue professional careers in health care. Ashley's desire to participate in a clinical rotation at Baystate grew out of her exposure to the organization's academic mission and reputation for quality and excellence.

Ashley exemplifies many who have grown up in our community, received health care from Baystate, and experienced the remarkable benefit of learning and potentially establishing a rewarding career in the community in which they choose to live and thrive among family and friends.

"It is rewarding to observe the circle of giving through relationships between Baystate Health and the community," says Susan Toner, vice president of Development and executive director, Baystate Health Foundation. "Baystate is fortunate to have whole families who are thankful for the care we provide and choose to support us with philanthropic gifts and it is rewarding to know that we can build our workforce with people from our community who want to give back through careers in the health sciences." ■

Sarah Gillett Services Supports BVNAH Alzheimer's Program



Sarah Gillett Services for the Elderly was born out of the sale of the Westfield Home for Aged People and for over 40 years the organization has been using the funds from the sale of the home to promote the health and well being of aged people in Westfield and its surrounding communities. Since 1990 Sarah Gillett Services for the Elderly has supported the Baystate Visiting Nurse Association & Hospice (BVNAH) Alzheimer's Program. This support allows BVNAH staff to provide Alzheimer's assessment and care to patients and much-needed support groups for family members coping with the care for their loved one who might not otherwise be able to afford it.

Over the last 20 years, Sarah Gillett Services has donated close to \$70,000, allowing for specialized care for Alzheimer's patients. Ellen Nepomuceno, the BVNAH nurse who works with Alzheimer's patients and their families says "Generosity from the fund has allowed us to host support groups for family caregivers, giving them an opportunity to communicate with others who share the same struggles, hope, and love for their family members. These groups have been an incredibly valuable resource for our patients and those who care for them."

For more information about the Alzheimer's program and how you can support it, call 413-794-6526. ■

Maximizing Tax Benefits through Charitable Giving



In my work as an estate planner, I am often asked what simple steps a client might take to maximize tax benefits, make a significant gift to a charitable organization like Baystate Health Foundation, at reasonable and sustainable cost.

An often overlooked and easy means of making such a charitable gift is a life insurance policy.

Most individuals own a policy, which may either be a term policy, a whole life policy, or possibly a hybrid, such as a variable life or universal life policy. In any event, by transferring this policy to a charity, the donor receives a charitable deduction for the approximate cash value of the policy. So long as the donor itemizes their income tax return, the donation may be taken on their individual income tax return in the year the policy is conveyed.

The annual premium, which is gifted to the charity by the donor, becomes an additional income tax deduction every year the premium is paid. In individual circumstances the charity may choose to pay the premium so that the policy will not lapse. It is recommended that periodically the policy is checked to determine the current performance of the company and the policy by obtaining what is known as an in-force illustration to determine the viability of the policy in the future.

By gifting a life insurance policy, the death benefit of the policy is normally significantly higher than the cash value, and the donor may not be willing or able to give that large a sum of money during his or her lifetime. However, upon their death, there is a significant

benefit to the charity which could even represent a naming opportunity for the donor. In addition, the value of the death benefit will also be excluded from the donor's estate for estate tax purposes, since the charitable gift was made during lifetime. If a person has a significant life insurance policy, they may wish to add additional funds to the charity so that the policy will be paid up sooner, and, possibly, future premium payments will not have to be made on an annual basis.

If a person has a relatively small policy, one which would not make a substantial difference to one's heirs or beneficiaries, it could be an excellent opportunity to make a donation to Baystate by assigning the policy to the Foundation. It only takes a few relatively simple forms, with no legal fees or accounting fees, to effectuate this relatively simple transfer of the ownership and beneficiary forms to gift the policy.

Besides gifting a life insurance policy, charitable donations can be made in other ways to maximize tax benefits through wills, trusts, gift annuities, and life estates on deeds. Such opportunities are not only wonderful opportunities to obtain a tax benefit, but also support Baystate in its mission to meet the healthcare needs of our community.

Hyman G. Darling, Esq.

Learn More About Planned Giving Online

Go to bshf.aboutgiving.net to learn more about planned giving strategies. Through the site, you can create a personalized illustration showing how a gift annuity can provide you with lifetime income, tax savings, and a generous gift to Baystate Health Foundation. The site also offers a list of members of our Professional Advisors Committee if you need one-on-one counseling.

Baystate Health Foundation
280 Chestnut Street, 6th floor
Springfield, MA 01199
baystatehealth.org/bhf
413-794-GIVE

Baystate  Health Foundation

The mission of Baystate Health Foundation is to inspire a "culture of philanthropy" and encourage philanthropic relationships that will support the mission and vision of Baystate Health.