

Philanthropy

Matters

Partnering with you to support a healthy community.

Meet Our New
Leader p.4

Celebrating Our
Caring Community p.10

Donors Make a
Difference p.12

Philanthropy Matters

PhilanthropyMatters serves as a newsletter to MaineGeneral's supporters and friends. Information is written by MaineGeneral's Philanthropy and Marketing staff.

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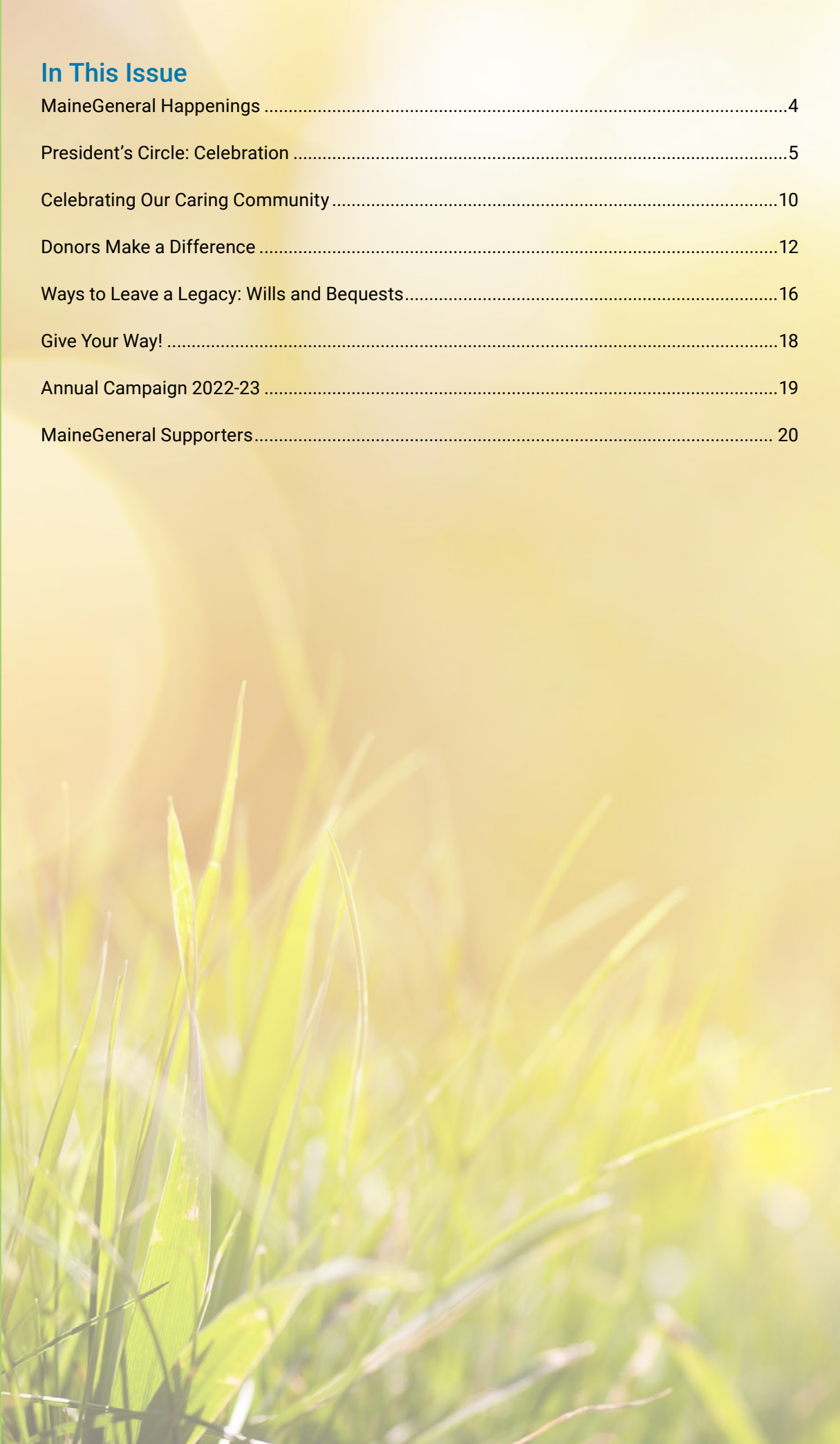
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Greetings!

Warm summer greetings from the MaineGeneral Office of Philanthropy! We have some exciting things happening at MaineGeneral that we can't wait to share with you. As we welcome the warm, fun-filled days of summer, we also welcome Nathan Howell as our new president and CEO. We enjoyed celebrating Nate's arrival and wishing Chuck well in his retirement at our annual President's Circle event at the end of June (p.5). It was wonderful to see so many of you, and to celebrate your generosity!

It's been a season full of hope and gratitude, and we thank our community members who fundraise on our behalf (p.10), as well as our highlighted family trusts (p.12). Support like yours goes beyond a transaction; it shapes the delivery of health care. This is demonstrated on p.14 as we share how MaineGeneral's Remote Patient Monitoring program was shaped by donor support. August is Make-a-Will Month and we hope you will peruse p.16 to learn more about leaving a legacy with your estate planning.

We hope this issue of *PhilanthropyMatters* finds you well and enjoying all of the delight that summer in Maine can bring. Thank you for all you do to support a healthy community. Our work would not be possible without you!

With warm summer wishes,

Sarah & Nicole

Sarah Kalagher & Nicole McSweeney
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MaineGeneral Happenings

A message from MaineGeneral President & CEO, *Nate Howell*

In my first communication to you as CEO of MaineGeneral Health, I want you to know how excited I am to be here serving our community and how grateful I am to hear of your generous support.

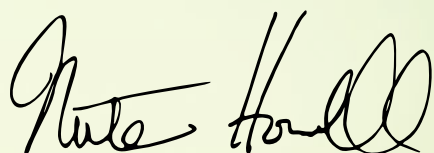
When I decided to look at the next step I wanted to take in my career, I spent a good deal of time thinking about the type of organization I wanted to join. I was looking specifically for an independent and innovative health care organization with a strong internal culture and a set of shared values in action with a mission and vision to provide the best possible health care to the communities it serves.

I believe I have found the perfect match with MaineGeneral, and I look forward to working hard to maintain and build upon the historical success of this organization, success that support like yours has made possible.

The challenges MaineGeneral must overcome to provide the best health care close to home for our communities are real. Financial challenges and staffing shortages are issues that will require continued work and innovation to overcome.

As we begin this journey together, I commit to learning from you what is working well, what can be improved and how MaineGeneral can best be your partner in health.

I am happy to be a part of this team and I look forward to working with you and serving this community.



Nate Howell
President & CEO, MaineGeneral Health



President's Circle: *Celebration*

Our annual President's Circle appreciation event was a bittersweet, rainy evening full of hugs, laughter and memories. Board chair Jim LaLiberty honored our retiring President and CEO Chuck Hays and celebrated his 28 years of service to MaineGeneral. Our newly appointed President and CEO Nate Howell was in attendance with his wife, Julie and was warmly welcomed.



The four most recent MaineGeneral CEOs (left to right): Chuck Hays, Scott Bullock, Nathan Howell and Warren Kessler.



The evening was full of celebration, milestones and memory making. Despite the rain, what we hope truly showed throughout the evening was our heartfelt gratitude. Everything shared that evening and everything we're most proud of was made possible by the generosity of our supporters and friends like you. If you are interested in learning more about becoming a President's Circle member, please visit give.mainegeneral.org/presidentscircle.







Celebrate
President's Circle
Appreciation Event





MaineGeneral Medical Center *Auxiliary Gives Back*

The MaineGeneral Medical Center (MGMC) Auxiliary is a group of dedicated volunteers with a goal to promote the well-being of all patients and families in Central Maine communities.

To date, the MGMC Auxiliary has raised and donated more than \$1 million to support the medical center’s efforts in caring for patients and family members and is the largest supporter of MaineGeneral’s scholarship program. Membership is open to men and women who want to further MGMC’s mission of enhancing, every day, the health of our patients, families and communities.



Sandy Small-Hughes

Our members enjoy being together and doing their part to help MaineGeneral make a difference in people’s lives. As past president and current secretary Sandy Small-Hughes shared, “I feel very grateful for the Auxiliary – I’ve made so many great friends that I would never have met otherwise!”

When speaking with board leadership, the “why” behind their dedication was clear – gratitude for the care MaineGeneral provides and a calling to pass on their appreciation through service. We are so grateful for this group’s hard work and support of MaineGeneral’s programs and services!

You can learn more about the Auxiliary and join their membership by visiting www.mainegeneral.org/volunteering.

“After navigating my own diagnosis and receiving treatment at MaineGeneral, I was inspired to give back. As the Auxiliary’s incoming president, I invite anyone who wants to learn more about joining us to reach out and meet me for a cup of coffee.”



– Gedske Szepsy

Giving From the *Heart*

For the second year in a row, the Nurse Engagement Committee sponsored a system-wide food drive. The committee teamed up with the Office of Philanthropy to coordinate the collection of donated food from throughout the MaineGeneral system. More than 2,140 pounds of food was collected, divided and delivered to the Augusta and Waterville Food Banks, providing many meals to those in our communities who need them. 🌱



“Wow! What another terrific Feed-A-Neighbor food drive organized by MaineGeneral’s Nurse Engagement Committee! Using Feeding America’s value of \$1.70 per pound for donated food, the gift from MGH employees amounts to nearly \$2,000 that will help provide meals to hundreds of our hungry neighbors. Incredible! Thank you!”

— Bob Moore, Executive Director, Augusta Food Bank

“Thank you for the donation of over 1,000 pounds of food collected during your recent food drive. Your support of the Greater Waterville Area Food Bank and our mission to end hunger in the greater Waterville area is appreciated!”

— Sandra Hammond, President, Waterville Food Bank



Celebrating Our Caring Community

Mix Maine Media

\$4,000 to the Harold Alfond Center for Cancer Care (HACCC)

107.9 The Mix sold pink T-shirts in October for Breast Cancer Awareness Month, raising \$4,000 for the HACCC. Thank you, Mix Maine Media!



United Fitness

\$1,556 to the MaineGeneral Breast Care Program

During October, United Fitness raised funds in support of breast cancer awareness. Their efforts raised an impressive \$1,556 for MaineGeneral's Breast Care Program! Thank you to United Fitness for supporting local breast care!



The Quarry Tap Room

\$2,500 to the HACCC

Thank you to the Quarry Tap Room, who created a specialty drink and donated a dollar for each one sold last October. In addition to this fundraiser, the restaurant contributed and brought their grand total to \$2,500 in support of local cancer care.





Tradewinds Pumped Up to Fight Cancer Program

The team at Tradewinds Clinton presented the HACCC with a check for \$5,957.24 from their Pumped Up to Fight Cancer Program this quarter, where one cent from every gallon of gas pumped supports the transportation of patients needing cancer care. This brings their total giving to \$118,445.97 – and counting! Thank you, Tradewinds, for supporting the cancer patients in your communities!

Kents Hill Field Hockey

\$1,587 to the HACCC

The Kents Hill field hockey team played for the MAISAD championship in November while also showing support for our cancer community. The Huskies wore purple in support of Pancreatic Cancer Awareness Month during their game and raised \$1,587 for the HACCC. Go Huskies!



Erskine Academy

\$11,000 to the HACCC

Erskine Academy students, staff and our community came together on May 12 for their annual cancer walk benefitting the HACCC. At their year-end assembly, the senior Student Council representatives presented a check for \$11,000 to the cancer center! To date, these incredible students and their supporters have raised \$74,214.63 in support of local cancer care! We are so grateful to Erskine Academy for their kindness, their support of local cancer care and for inspiring the next generation to give back.



Donors Make a

Difference



The Sheaffer Trust

The Lewis J. Sheaffer Community Trust financially supports programs and projects in the Augusta, Gardiner, Turner and Winthrop communities. Lewis John Sheaffer, “Jake” to his friends and “Grumpy” to his grandchildren, was married to Katharine Hazzard, “Kay” to her friends and “Gaga” to her grandchildren. Katherine’s parents were Robert and Edna Hazzard. In 1931, Maine was sixth in shoe production in the country and Hazzard manufactured 56 percent of Maine-made men’s footwear. The success of the Central Maine shoe industry and generous nature of the Hazzard family resulted in the establishment of the Lewis J. Sheaffer Community Trust.

In its three years of giving, the trust has supported local food pantries, oil assistance, school programs, crisis centers, animal shelters, COVID-19 relief efforts at MaineGeneral and many other critical needs and organizations throughout the four communities.

This year, the Trust graciously supported three projects/programs at MaineGeneral. First, we were able to purchase a new vehicle to bring Assertive Community Treatment (ACT) Team clients to and from appointments. Our Community Health Department purchased a new mobile health unit, allowing us to bring health and wellness services into the community. And, lastly, the Trust provided additional funding for the Mary-Grace Bean Memorial Scholarship so we could provide six additional scholarships to students living in Augusta, Gardiner, Turner and Winthrop seeking a career in health care.

The Shaeffer Trust’s generosity helps keeps Maine’s local shoe industry legacy alive!

The Mary T. & Curtis D. Lovill Trust

The Mary T. & Curtis D. Lovill Trust's mission is to financially support the eye-care-related needs of Maine residents. Two original trustees, George Heselton and Bob Davis, worked directly with the Lovills to create and initiate what now has become a several-decades-long pursuit of identifying and funding eye-related education and research, with a focus on enhancing quality of health services, eye safety, prevention and genetic research.

The Trust has funded research within Maine via the Jackson Lab and supported the work of Maine's Iris Network, helping people with vision impairment or blindness attain independence and community integration.

Locally, the Trust supported the purchase of an additional eye camera for MaineGeneral's Emergency Department in Augusta. This additional technology allows for interfacing between the Emergency Department and the MaineGeneral Eye Center. This equipment allows the physicians at the Eye Center to assess patients presenting with eye-related emergencies, reducing the burden of travel on both the medical staff and the patient. We are very grateful for the Trust's support of this equipment purchase and the enhancement to the delivery of care at MaineGeneral! ♡



“We are extremely grateful for The Lovill Trust's generosity. Their gift will touch the lives of many patients in Central Maine, ensuring that state-of-the-art eye care technology is available to our friends and neighbors, right here close to home.”

— Donna Gosselin, Practice Administrator,
MaineGeneral Eye Center

Remote Patient Monitoring:

Donors Shaping the

Delivery of Health Care

In January 2020, MaineGeneral launched a Remote Patient Monitoring (RPM) pilot, allowing patients to stay in their homes while still receiving observation and care from our medical team. Since launching the pilot, the program has evolved from supporting only patients with congestive heart failure (CHF) to supporting patients with any chronic disease or COVID-19.

Patients who would benefit from RPM are referred by a member of their care team to be monitored from their home. This monitoring includes a tablet-based Bluetooth system and its measurement devices – scale, blood pressure machine and/or oxygen sensor. If the patient takes any daily medications, that information is also pre-programmed by staff so the patient receives medication reminders during the day.

Each morning, patients use the system to send their weight, blood pressure and oxygen level with the click of a button. These vital statistics are monitored by our Outpatient Care Management team. Abnormal vitals or other concerning data bring a follow-up call from staff and, if needed, conversations with the patients' primary care clinicians to determine a course of action. The intent is to address issues early before they become acute and require a trip to the hospital.

The success of our RPM program can be greatly attributed to the generosity of private foundations, employee and community donors and federal funding agencies. Between 2019 and 2022, we secured more than \$469,000 from external sources to help build an RPM infrastructure that, only three years later, is a highly successful, self-sustaining program at MaineGeneral.





This support includes:

- \$50,000 from the Davis Family Foundation to pilot a RPM program at MaineGeneral. These funds supported the first year of start-up costs including unit (tablet) rentals and software, as well as technical assistance and training from our vendor, Health Recovery Solutions.
- \$19,932 from MaineGeneral's employees during our annual Employee Combined Campaign in which RPM was a beneficiary.
- \$71,487 from our community through the Office of Philanthropy's 2021 Spring Appeal focusing on advancing MaineGeneral's digital strategy, including RPM.
- \$328,000 from the Federal Communications Commission through Round 2 of their COVID-19 Telehealth Program, which was used to purchase additional RPM units and cover the one-year licensing fees for 200 units.

When the pilot launched in 2020, we had funding for 50 units and enrolled about 25 patients at one time with a diagnosis of CHF. In just three years, we now have 275 units in rotation, allowing us to serve 230 patients at one time, and have expanded enrollment to patients with any chronic condition or COVID-19. With a growing number of patients, we also needed to increase the number of staff for the program, which started with no dedicated staff in 2019. We now have three dedicated staff and three others assisting.

Since the program's launch, we have enrolled 891 patients and more than 89 percent were actively monitored for at least 16 days. ↘

“We had a young lady who had several admissions to the Critical Care Unit due to her asthma. Through collaboration between the Community Care Team and RPM, she remained healthy for months, with no Emergency Department visits or admissions. She also learned how to manage her asthma and seek help before needing hospitalization.”

— Jessica Nalesnik, Director, Outpatient Care Management

Ways to Leave a Legacy:

Wills and Bequests



August is Make-a-Will Month!

It's a perfect time to create a will for the first time, review your current will against your other account or policy beneficiaries or add amendments (codicils) to your existing will.

No matter a person's age, having a valid will is an important way to plan for the future and extend the legacy of your care and generosity beyond your lifetime.

Why Write a Will?

Writing a will could seem daunting, but the relief and security for yourself and your loved ones is well worth the time and energy.

When someone dies without a will, their assets are dispersed by the government according to state law. The transfer of assets could be very different from what that individual may have wanted.

As you prepare to write your will, take time to think through your wishes in detail so your final document honors your intent, which may include provisions for relatives or friends, guardianship of children, estate or capital gains tax considerations and your charitable objectives. You can write a will using free, online technology or with an attorney for more complex estate matters.

Bequests: Giving Through Your Will

Bequests are gifts left through your will or living trust to specific individuals and/or organizations. Bequests can be of any amount or value that is meaningful for you and could be one or more combinations of the following bequest types:

- **General** – bequests of specific amounts or values, paid from the estate's general pool of assets
- **Contingent** – bequests that are dependent on certain other conditions being met, including as an alternate provision if an intended beneficiary passes away before the will is executed
- **Percentage** – bequests dividing your estate's assets among beneficiaries by proportion rather than amounts or values
- **Demonstrative** – bequests of cash or securities, paid from specific accounts or policies as the source of funds
 - › Be certain your will and your accounts align – if a demonstrative bequest's beneficiary is not the same as the specific account or policy's beneficiary, the funds will not go to the person or organization named in the will
- **Specific** – bequests of specific non-cash assets, such as a piece of jewelry or art
 - › Before writing a specific bequest into your will, connect with an intended beneficiary, especially a nonprofit, to be sure they can accept the item(s)
- **Residual** – a bequest of the estate's remaining assets after fulfilling all other bequests, taxes and debts

Leaving a Bequest to MaineGeneral

Making a bequest to support MaineGeneral could be as simple as including a single sentence in your will or living trust. For example:

- I give to MaineGeneral Health of 35 Medical Center Parkway, Augusta, Maine, the sum of \$_____ for the organization's general use and purposes.
- I give to MaineGeneral Health of 35 Medical Center Parkway, Augusta, Maine, _____ percent of the rest, residue and remainder of my estate/trust for the organization's general use and purposes.

If you've already written your will and would like to add a bequest, you can do so with an attorney through an amendment to an existing will (called a codicil).

Using our legal address in Augusta within your bequest helps avoid possible confusion with other health care systems. Your attorney or wealth planner may also suggest other elements or language, particularly if you wish to support our mission in a specific area, such as MaineGeneral Hospice or the Harold Alfond Center for Cancer Care, or if you would like to make a contingency bequest.

We are happy to speak with you informally about how a bequest might accomplish your goals. If you wish to bequeath non-cash assets, discuss bequest naming opportunities or endowments or make a bequest restricted to a certain program, we'd also like to help ensure your intent and MaineGeneral's gift acceptance policy are aligned for maximum impact. Call **207-626-1809** or email philanthropy@mainegeneral.org to set up a visit! 🐦

Are you planning to leave a legacy gift to MaineGeneral? Please let us know!

We would love to thank you and recognize you as a member of our Kennebec Circle, a symbolic representation of our legacy donors' united strength in shaping the future through their philanthropic estate planning. When you allow us to recognize your intentions, you also may positively impact someone else's decision to join the Kennebec Circle, thereby broadening your own impact.

Please call **207-626-1809** or email philanthropy@mainegeneral.org to discuss legacy gift options or to share plans to leave a legacy gift with a member of the Office of Philanthropy. (Specific information you may choose to share about a planned gift remains confidential unless you authorize MaineGeneral to publicly recognize your commitment.)



Give Your Way!

There are many ways you can help provide quality health care in our community. Which of the following gift options is a good fit for you?

Sustaining Gifts

Easily automate monthly contributions to the annual campaign through your credit card, debit card or bank account at give.mainegeneral.org/sustaining. Sustaining gifts offer convenience for you through right-sized amounts and one-time set up, and they provide meaningful, reliable funding for MGH.

The President's Circle

The President's Circle (PC) encompasses the committed donors who make thoughtful gifts of \$1,000 or more annually. Each June, we celebrate our PC supporters as we wrap up our fiscal year, inviting members to personally hear from MaineGeneral leadership about how their generosity has been reflected in MaineGeneral's community impact over the last 12 months. We enjoyed this year's event on June 24 (see p.5)!

We would love for you to join this circle and invite you to consider making a gift of \$1,000 or more, whether as a one-time gift, or through smaller, monthly gifts. Learn more at give.mainegeneral.org/presidentscircle. We hope to see you at our next President's Circle celebration in 2024!

Legacy Giving and the Kennebec Circle

Leave a legacy and shape the future of health care in central Maine! Members of the Kennebec Circle are loyal friends of MaineGeneral who have made a gift commitment through a bequest, beneficiary designation or charitable annuity. If you have already included MaineGeneral in your estate plans and would like to be recognized in the Kennebec Circle, or if you wish to learn about joining its ranks, we would like to hear from you. Learn more at give.mainegeneral.org/kennebec.

Major Gifts

Your gift of \$5,000 or more creates major impact for people of all ages and circumstances. When you choose a major gift, you can help meet needs through specific programmatic support, or you can give the priceless gift of flexibility by allowing your dollars to go to the area of greatest need. Naming opportunities are available across the system, customized to your philanthropic goals.

Gifts in Honor and Memory

Many individuals honor or remember a loved one through their personal gifts or by directing memorial gifts to MGH. We gratefully recognize this generosity and inform the honoree or family that a gift has been made in tribute.

Event Sponsorships

Focus your philanthropy on a specific event, and enjoy special opportunities for recognition, media exposure and brand association with Maine's third-largest health care system. Sponsorship packages can be customized to fit your strategic marketing goals.

MGH Community Partnership Program

Maximize your impact and recognition by combining your annual campaign support and event sponsorship into one gift conversation! MGH Partners give at least \$1,000 to the annual campaign and at least \$1,500 as a sponsor for events which benefit important patient programs. We recognize MGH Partners at their combined giving level within the President's Circle, as well as in event promotional materials across the year.

Corporate Partners

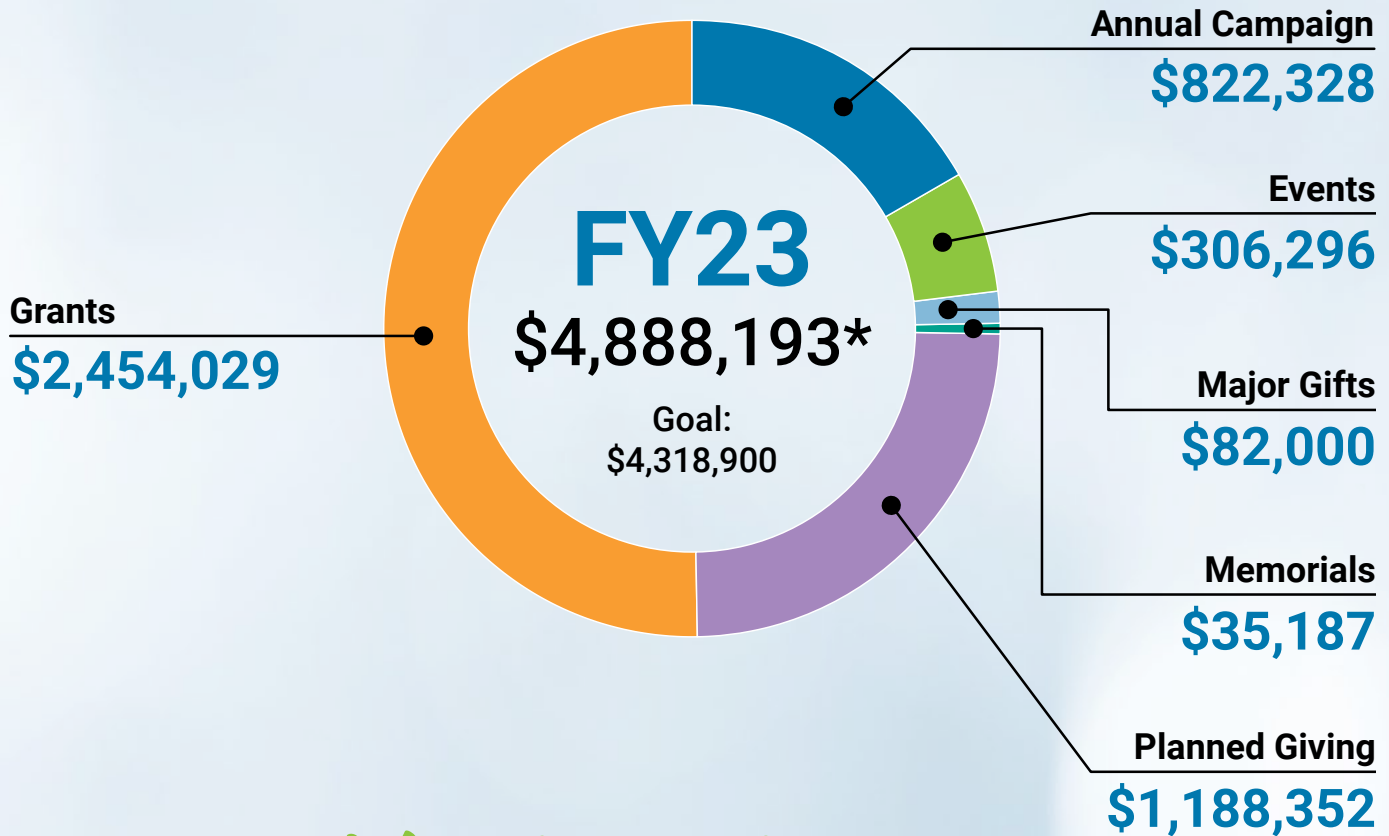
Corporate donors to MaineGeneral's annual campaign at \$1,000 or more are gratefully recognized in our public donor listings.

We would love to speak with you about these opportunities and how you can make a difference in thousands of lives. Please reach out to Sarah Kalagher (207-626-7234; sarah.kalagher@mainegeneral.org) or Nicole McSweeney (207-621-9307; nicole.mcsweeney@mainegeneral.org), or send an email to philanthropy@mainegeneral.org to set up an introductory conversation. ✨

Philanthropy

2022-23

We continue to be humbled by the generosity of our constituents, with fundraised dollars exceeding goal for the eighth consecutive year. We are grateful for and inspired by the generosity that surrounds us! 🙌



FY23 Grant *Highlights*

- American Cancer Society awarded \$10,000 to support transportation needs of our cancer patients.
- Kennebec County, through the American Rescue Plan Act, provided \$313,000 in support of our School Flu Clinic, Harm Reduction Program, Women’s Residential Program.
- Lewis J Shaeffer trust awarded \$80,000 to support transportation needs of our patients, delivery of community health programs in the community and scholarships for students pursuing careers in healthcare.
- United Way funded 7 mission-driven MaineGeneral programs for a total of \$61,000.

MaineGeneral Supporters

The following list reflects individuals and organizations whose gifts of \$1,000 or more were received between July 1, 2022 – June 30, 2023. We are grateful for every donor's generosity.

The President's Circle

The President's Circle recognizes and honors MaineGeneral's leadership donor groups through special recognition and invitations to events throughout the year. Membership begins with an annual campaign gift of \$1,000.

Founder's Circle - \$25,000 +

- ACC Women's Golf Association
- ☉ Charlie's Motor Mall, Inc.
- Mr. and Mrs. Stephen LaVerdiere
- David and Janet Preston
- The Charles A. Dean Memorial Trust
- Tradewinds Clinton

Benefactor's Circle - \$10,000 +

- ☉ Central Maine Power Company
- ☉ G & E Roofing Co., Inc.
- Ms. Catharine Guiles
- ☉ Kennebec Savings Bank
- MaineGeneral Medical Center Auxiliary
- MaineGeneral Medical Staff
- Dr. and Mrs. Paul A. Minot
- Michael and Beth Nowak

Advisor's Circle - \$5,000 +

- ☉ Augusta Fuel Company
- Timothy Clifford, Jr, MD and Nancy Clifford, DMD
- Ms. Dora Dostie
- Paul and Alison Gagliardi
- Hair Designs Unlimited
- Chuck and Maria Hays
- Mr. and Mrs. Douglas F. Jennings
- Kennebec Anesthesia Associates
- Mrs. Lucie McCarthy
- Sandra and Peter Prescott
- Jennifer Riggs
- The Shuman Family
- Eric Stram, MD and Shari Stram, DVM

Leadership Circle - \$2,500 +

- Mr. and Mrs. Richard Albert
- Miss Deborah E. Bowden
- Scott and Trish Bullock
- Chest Medicine Associates
- Mr. and Mrs. James A. Clair
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- ☉ WIPFLI
- President's Club - \$1,000 +**
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- Mr. and Mrs. Vaughan A. Allen

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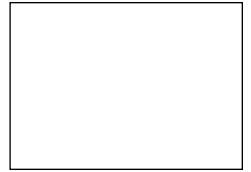




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