

*Lodi Memorial Hospital Foundation*

# 2018 ANNUAL REPORT



Lodi  
Memorial Hospital  
Foundation, Inc.

*“Enhancing the Greater Lodi community’s healthcare  
and healthy living through philanthropy”*

# Message from our Board Chair



2018 was an eventful year for the Lodi Memorial Hospital Foundation. We successfully completed our First Day Capital Campaign, which raised \$500,000 for the establishment of a Level II Neonatal Intensive Care Unit for AH Lodi Memorial. Through the generosity of our loyal donors, we dedicated this unit in September, and it has already served numerous families, thus successfully keeping mothers and newborns together after a difficult delivery.

Our SummerFest and Dr. Russell B. Steele Golf Tournament provided funds to purchase a Dexa Scan machine for the hospital's Advanced Imaging Department. This machine helps with the diagnosis of osteoporosis and the detection of early fracture risk. It has been in operation since October and serves an average of six patients each day.

The Foundation's Scholarship Committee had their busiest year in its 10-year history. We had \$61,500 in scholarship monies to award. Out of 80 scholarship application submissions, we interviewed and awarded 28 dedicated high school students and AH Lodi Memorial staff continuing their education. These scholarships are available due to an endowment established by the Foundation and by a donation from the Dr. Arthur and Florence Boehmer Trust.

I have enjoyed my two years as Chairman of the Board, due in large part to the incredible individuals that make up our Board. They take time out of their very busy schedules to attend committee and Board meetings, volunteer and attend our events, and they support the Foundation financially through their generous gifts. They are a diverse group, and through their wisdom and dedication we can successfully support our mission to enhance the Greater Lodi community's healthcare and healthy living through our philanthropy.

I look forward to another productive year for the Foundation in 2019. Trent Diehl will be our new Chairman beginning in May. He has been very active in his service to the Foundation and will support the fulfillment of our mission through philanthropic giving, events and donor relations.

A handwritten signature in black ink that reads "Mike Georguson". The signature is written in a cursive, flowing style.

**Mike Georguson**  
Board Chairman  
Lodi Memorial Hospital Foundation

*On the cover: In the Level II NICU is Melissa Lampkin, RN, with mom Kirstin Borth and Dutch Reuben Borth, born December 9, 2018.*

# Campaign COMPLETED - Level II NICU Opens



What an amazing result! In less than a year, our community stepped up and funded a new level of service in the Neonatal Intensive Care Unit (NICU). The First Day Capital Campaign was closed in September of 2018 after exceeding its goal of \$500,000 to fund a new Level II NICU at AH Lodi Memorial. This level of service now provides care for newborn deliveries as early as five-weeks premature and will allow over 200 families to stay in town and not suffer the emotional and financial stress created when a baby is transferred for critical care.

The campaign was funded through donations from loyal individuals and local companies, as well as grants from the Cortopassi Family Foundation, DART Foundation and the Hearst Foundation. A campaign event was held on November 16, 2017 at Oak Farm Vineyards and, despite the worst rain storm of the year, 127 donors attended and contributed nearly \$170,000 that evening.

“What an incredibly generous community we have. It is a legacy of giving that began in 1945 to build Lodi Memorial and continues today, consistently improving services year in and year out,” stated Wayne Craig, LMHF CEO.

Opening a Level II NICU provided the opportunity to partner with UC Davis Medical Center, and AHLM now has nine board-certified Pediatricians on staff, which gives pediatric coverage 24/7. A modest remodel of the Nursery, state-of-the-art equipment and a Telemedicine link to UCDMC provides the most advanced care protocol available for newborns. Thank you to all of our donors for making this possible.

## 2018 Was Record Year for Grants

Lodi Memorial Hospital Foundation does not have a tradition of seeking grants. However, in 2017 and 2018, the First Day Capital Campaign presented the need to increase grant applications. Those efforts were remarkably productive, resulting in four major grant awards within a 12-month period listed below, three for the Level II NICU, and one for the FLIP Program:

**\$50,000** - Community Foundation of San Joaquin for the Fit Life Impact Program (FLIP)

**\$10,000** - Cortopassi Family Foundation for final phase of Pediatric Program Upgrade equipment

**\$50,000** - DART Foundation for the Level II NICU (room sponsorship)

**\$50,000** - Hearst Foundation for Level II NICU equipment

The Hearst Foundation, founded by William Randolph Hearst in 1945, is one of the largest philanthropic grantors in the nation, with a corpus of over \$1 billion. Receiving a grant from Hearst indicates that Adventist Health Lodi Memorial is recognized as a top tier healthcare provider on a national level. We are proud that our programs and staff can provide such excellent care and that the Hearst Foundation acknowledged this by awarding this significant grant.

# Message from Our CEO



As I reflect on 2018 and our work at Lodi Memorial Hospital Foundation, I am overwhelmed by the level of generosity and consistent giving we receive from our community. Lodi Memorial Hospital has, since it opened in 1952, been not only a provider of excellent healthcare locally, but more importantly, it has been a cornerstone for bringing the Greater Lodi community

together. When a need arises, the community responds. We are truly *"Together Inspired."*

This could not have been more evident than with the successful capital campaign to fund and open a new Level II Neonatal Intensive Care Unit. Over \$500,000 were raised in a year from all corners of our service region, led by our major donors and supported at every level of our community. We can now keep approximately 200 families in town and avoid the emotional and costly separation often resulting from premature or complex births. Thank you to all of our donors for this remarkable gift.

In addition to the NICU campaign, the Foundation was able to fund numerous other needs for the hospital and invest in our community with a joint effort involving Lodi Unified School District, GOT Kids Foundation and Adventist Health Lodi Memorial to create the Fit Life Impact Program (FLIP). You can find the details on this program later in the report. Our scholarship program grew substantially with over \$61,500 awarded to 28 scholars. Once again, our events saw the largest attendance ever and raised more funds for our mission, thanks in great part to our corporate sponsors and major donors.

Reading through our 2018 Annual Report you will see the breadth of activities we engage in to support the hospital and how the leadership of our Board of Directors, with help from volunteers, provide the pathway and energy to be successful in partnership with our generous donors. We look forward to 2019 with even larger philanthropic and stewardship goals.

Blessing to All,

A handwritten signature in blue ink that reads "Wayne Craig". The signature is fluid and cursive.

**Wayne Craig**  
President/CEO  
Lodi Memorial Hospital Foundation



## Holstine Estate Gift Received

As it is with most legacy gifts, donors commit years in advance to support Lodi Memorial Hospital Foundation.

In March of 2018, a phone call was received indicating a large estate gift from Cora Holstine was being made to LMHF.

Mrs. Holstine was raised in Lodi and moved to San Francisco, where she worked as a legal secretary and married an insurance agent, Milton Holstine.

The Holstines were annual donors to Lodi Memorial for years, then the gifts ceased. We later learned Mr. Holstine had passed away, and Cora was in a retirement home and in ill health.

In the mid-1990s Mr. Holstine's company sold, and the Holstines set up several investment accounts to support charities for which they were passionate. Over time these accounts grew to significant levels.

In May of 2018, Lodi Memorial Hospital Foundation received their generous gift of \$700,330. Estate gifts are vital to our mission, and we appreciate donors who end their lives in the same charitable way that they had lived it.

Please consider using our complimentary estate planning service to review your legacy plans.

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## Estate Planning Supports Our Hospital

Since 2015, LMHF has provided a complimentary estate planning service to the community. Participation is easy, and there is no obligation to donate to the Foundation or hospital.

Appointments can be made by simply calling (209) 339-7833. You will meet confidentially with a consultant from Thompson & Associates to review your current plan, or generate a new one and assure that your legacy is created

according to your desires.

Those who choose to remember the Foundation in their plan will be recognized as a member of the legacy society group known as **Acorns to Oaks**.

This is a wonderful way to support our community hospital and provide gifts that might not be possible during your working years or retirement. Many of those who have completed the program have been able to

increase gifts to their families and support charities they honor just by good planning.

Since 2016, clients have dedicated some \$1,550,000 for the hospital and nearly \$5,650,000 for other charities from their estates.

Please take advantage of this complimentary service, and consider joining our Acorns to Oaks Society.

# Walk for the Health of It

It was a perfect Mother's Day weekend in 2018 for the 28th **Walk for the Health of It**. Over 1,400 participants gathered in the parking lot of AH Lodi Memorial to warm-up with Jazzercise (who has participated for all 28 years). As one of our three annual events, the Walk winds you through the beautiful, shaded streets in the heart of Lodi.

Community members of all ages – from strollers to senior-care facility residents, families, schools and hospital department teams – came out to take part in the fun. The event offered a 5K walk/run, 1-mile Kids' Fun Run and 1-mile Walk and Roll for wheelchairs and strollers.

The AH Lodi Memorial staff once again had 13 departments on hand to provide health screening services, advice and healthy snacks at the onsite health fair. Kids enjoyed the face painting, photo booth and the stuffed animals handed out by the Emergency Department staff.

Animal Friends Connection brought out a group of lovable dogs that were looking for great homes. All this with the background music, provided by DJ Marc Bregman. The Walk has raised over \$1.3 million since it began back in 1990.

**2019 Walk for the Health of It will be on Saturday, May 11.**



**WALK FOR THE HEALTH OF IT**  
Lodi Memorial Hospital Foundation

## Thank You to Our Generous Sponsors

*Dr. Carolyn Fowle*  
*Michael David Winery*  
*Vienna Convalescent Hospital, Inc.*  
*Cen-Cal Fire Systems, Inc.*  
*Diede Construction, Inc.*  
*Dennis Morita, CPA*  
*Golden State Restaurant Group*  
*E&J Gallo Winery*  
*Valley Outdoor Advertising*  
*F&M Bank*  
*Yoshi Kim*  
*Pacific Coast Producers*  
*Daniel Wolcott*  
*NORCAL Ambulance*  
*Marc Bregman*  
*Hanna, LLC*  
*Snider, Diehl, Sloup & Rasmussen, LLP*  
*Edward Jones/Jeremy Lenser*  
*Tokay Development, Inc.*  
*Dr. Daryl Payne*  
*San Joaquin Sulphur*  
*Thelma Stewart*  
*Dr. Jeffery Payne*  
*Delta Eye Medical Group*  
*West-Com & TV, Inc.*  
*Lincoln Financial Advisors/Peter Morris*  
*McDonald Family*  
*Dr. Stan Demski*  
*Phil and Daphne Felde*  
*Lodi Sunrise Rotary*  
*Dr. AnnieMarie Santos, M.D.*  
*Kurt and Sandra Kautz*



# SummerFest 34 Years and Growing

The beautiful Michael David Winery was the perfect setting for over 350 guests to enjoy a lovely summer evening of food and wine at the 34th annual **SummerFest** held July 14, 2018.

Fifteen restaurants and bakeries provided the generous tastings, which were paired with five Michael David wines and several Five Windows beers. This was the first year for Five Windows Beer Company, which proved to be extremely popular.

Our generous restaurants included Angelina's Spaghetti House, Angelo's, Bon Appetit, Cut the Mustard, De Vinci's, Edible Arrangements, Habañero Hots, Nothing Bundt Cake, Rocky Mountain Chocolate

Factory, Salisbury's, Thai Spices, Towne House, AHLM Vineyard Cafe, Wing Stop and Woodbridge Golf & Country Club.

Guests also enjoyed visiting with family and friends while seated around the peaceful lake, waterfalls and garden, listening to music provided by the West Bound Groove Band.

Proceeds from the event benefited the new Level II NICU that was established in September 2018. This event has raised more than \$1.2 million since inception and continues to be a favored event in our community. Mark your calendars for **SummerFest #35 on Saturday, July 13, 2019.**



## Thank You to Our Generous Sponsors

- Dr. Carolyn Fowle*
- A M Stephens Construction, Inc.*
- Diede Construction*
- Cen-Cal Fire Systems, Inc.*
- F&M Bank*
- Vino Farms, LLC*
- Yosemite Pathology/Precision Pathology*
- Sheila Wishek*
- Dr. Gary Kanemura*
- Fairmont Rehabilitation*
- Lodi Association of Realtors*
- NORCAL Ambulance*
- Jerry Hugo*
- Dr. AnnieMarie Santos*
- Jeremy Lenser*
- San Joaquin Sulphur*
- Lincoln Financial Advisors*
- Paul E. Vaz Trucking*
- Phil Felde*
- Yoshi Kim*
- McDonald Family*
- Zeiter Eye*
- Tokay Development*

# Russell B. Steele Memorial Golf Tournament

The 12th annual **Dr. Russell B. Steele Memorial Golf Tournament** was held on Monday, September 10, 2018, along the 27 beautiful holes of Woodbridge Golf and Country Club. This tournament was a sell out and has grown to be one of the most popular tournaments of the golf calendar year. It carries on the legacy of Dr. Russell Steele, who was a long-serving physician at Lodi Memorial Hospital.

This event is a wonderful opportunity to golf with friends and co-workers, meet the Foundation and hospital staff, win one of the over 35 raffle prizes and support important

missions of the Lodi Memorial Hospital Foundation. Ninety percent of the 2018 proceeds went toward the purchase of a Dexa Scan Bone Density machine for AH Lodi Memorial.

The remaining 10 percent of proceeds were donated to the Dr. Walter E. Reiss Outreach Clinic (WEROC), which is a free clinic for those who are not eligible for government or employer-sponsored health insurances or those who cannot afford to pay for health care.

Remember to register early for our next tournament - **Monday, September 9, 2019.**



## Thank You to Our Generous Sponsors

*Collins Electric*  
*Diede Construction, Inc.*  
*Cen-Cal Fire Systems, Inc.*  
*Hibser Yamauchi Architects*  
*American Chiller*  
*F&M Bank*  
*NORCAL Ambulance*  
*Fairmont Rehabilitation Hospital*  
*Lincoln Square Acute Care*  
*Wulff Capital Management*  
*Lodi Skilled Nursing & Rehabilitation*  
*Ulla Steele & Bill Baker*  
*West-Com TV, Inc.*  
*Medline Industries*  
*Doors Plus, Inc.*  
*Kelly Architecture & Planning*  
*McDonald Family*  
*Jeremy Lenser/Edward Jones*  
*Dr. Daryl Payne, DDS*  
*Yoshi Kim*  
*Phil Felde*  
*Arbor Rehabilitation & Nursing Center*  
*Ben McDonald*  
*Encompass*





## Scholarships Increase to **\$61,500** in 2018

2018 was a record year for academic scholarships awarded by LMHF. An unprecedented \$61,500 was distributed to 28 worthy students after a lengthy review of over 80 applicants.

High school seniors, previous awardees and AH Lodi Memorial staff (continuing their education) had their applications reviewed by the eight-member Scholarship Committee, which includes LMHF Board members, hospital staff and a previous LMHF scholarship recipient. Nancy Watts, a Foundation Board member, chairs the committee.

The applications, which highlight school activities, community involvement, work experience and scholastic achievement, were narrowed down to 28 finalists. The finalists were personally interviewed by the Scholarship Committee, and the winners were selected. Winners impressed the committee with the depth and breadth of their achievements, superior academics and their communication skills during the interview.

Lodi Memorial Hospital Foundation has two different scholarship funds. The LMHF Scholarships are funded by the LMHF Endowment Fund, established in 2016, and Boehmer Scholarships are funded from annual proceeds generated by the Dr. Arthur Boehmer and Florence Schubert Boehmer Trust, which is now managed by LMHF.

Scholarship applications open January 1, 2019. Guidelines and applications are posted online at [www.lmhfoundation.org/scholarships](http://www.lmhfoundation.org/scholarships). Brochures are available at the Foundation office. For further questions please contact Carolyn Hoff at (209) 339-7833.

### **Lodi Memorial Hospital Foundation 2018 Scholarship Winners:**

Ashley Aninag  
 Elizabeth Bennett  
 Catherine Castillou  
 Andrea Chapin  
 Alyssa Fuentes  
 Halle Georguson  
 Celio Gonzales  
 Lillian Kuehnesian  
 Megan McGregor  
 Alyssa Perez  
 Diana Garcia Perez  
 Kristian Pietrzyk  
 Benson Tran

### **Lodi Memorial Hospital Foundation 2018 Boehmer Scholarships Winners:**

Gloria Ashaolu  
 Mario Ballesteros  
 Maxwell Bonham  
 Erica Chang  
 Ben Colorado  
 Sofia Demski  
 Meghan Edalgo  
 Phillip Georguson  
 Chloe Hagen  
 Hayley Hower  
 Hayden Lewis  
 Megan McGregor  
 Jenna Mulrooney  
 Brandon Nelson  
 Lizzie Ramirez  
 Charlotte Suiza  
 Kaelyn Taylor

# Volunteers are Our Lifeblood

You often hear, "Volunteers are the lifeblood of any non-profit." It is certainly true for the LMHF Foundation, as we would not be able to put on any of our events without those who volunteer their time and energy to set-up, tear-down and run the events.

For our "Walk for the Health of It" to be successful, we need at least 120 volunteers. These individuals come from our Board, our scholarship recipients, local high schools and colleges, the AH Lodi Memorial staff, doctors' offices, and nursing facilities and our community. We are grateful for their service.

There are so many individuals that deserve recognition, but there is one family, in particular, that we would like to highlight this year. They have worked all three of our events and helped us with office tasks. This family is made up of Lillian and Christian Kuehneisen, Patti Murry and Steven Wolfe.

When they are asked to help, their first answer is, "Yes." After they have completed their duty, their next question is, "What else do you need us to do?" It is inspirational to see this family working so well together for a common cause and always willing to help.

This family connection started with our Scholarship Program. Lillian made such an impression during her interview explaining all the volunteer work she had done in school and in the community, along with high academics, that we granted her a scholarship. We quickly learned that if you ask Lillian to volunteer, you get the whole family, and for that we are grateful.

I want to thank every volunteer that has helped us in 2018, and all the years prior, for choosing us as a place they want to spend some of their precious, free time. We truly could not do it without them.



# Corporate Sponsors Make Events Possible

Each year LMHF holds three major fundraising events. Our **SummerFest** event is in its 35th year, the **Walk for the Health of It** will turn 29 in 2019, and the **Dr. Russell B. Steele Golf Tournament** is entering its 13th year.

These events could not take place, or yield net funds for our mission, without the generous annual support of our loyal corporate sponsors. We are fortunate to have a large group of philanthropic companies that recognize the importance of high-quality healthcare for the region. The list of all sponsors is too large for this setting; however, we would like to highlight a few of the larger and most consistent supporters.

The Diede Companies have been supporters of the hospital for decades, and the CEO, Steve Diede, has served as the LMHF Board Secretary since 2007. The Diede family was inducted into the Lodi

Community Hall of Fame in 2017 and has received numerous other awards for their philanthropic work in the community. It takes a loving heart to result in such loyal support, and for that we are forever grateful.

Dr. Carolyn Fowle has been associated with the hospital since the beginning of her career in counseling and therapy work. She has donated significantly each year and has been a top sponsor of the Walk for the Health of It and SummerFest for over a decade. She makes additional donations throughout the year as the needs arise, and she is the best example of what a donor can do through consistent giving. We also thank Dr. Fowle for her significant donation that sponsored the entire South Tower Healing Garden area of the hospital in 2008.

Please review our 2018 event sponsors listed within each event article elsewhere in this report.

# Fit Life Impact Program (FLIP) Report

In 2018, a program to generate healthy lifestyle choices, educate students about the benefits of exercise, diet, healthcare and career opportunities was developed for the After-School Program at Lodi Unified School District. LMHF partnered with Lodi Unified School District, Adventist Health Lodi Memorial and GOT Kids Foundation in launching the Fit Life Impact Program (FLIP).

The pilot program was held at four LUSD elementary schools, involving 160 students during the school year. Students were trained in a variety of physical activities by professional trainers from the Pure Form Fit gym.

LUSD nutritionists presented healthy food choices, AHLM nurses covered health impacts resulting from poor lifestyle choices, and AHLM staff hosted a career day to expose young students to employment opportunities available for high



school graduates.

The pilot program was very successful, and LUSD has agreed to expand the program for 2019 throughout the entire after-school program in over 20 schools, which will impact nearly 1,600 students.

This is one of many efforts AHLM has engaged to improve health in the region and reduce obesity-related disease onset. LMHF was delighted to be a partner in this process by acquiring a \$50,000 grant from the Community Foundation of San Joaquin.

**amazon**smile

**Support Lodi Memorial Hospital Foundation**

When you shop, simply go to [smile.amazon.com](https://smile.amazon.com). Login, select Lodi Memorial Hospital Foundation as your charity, and Amazon will donate a percentage of your purchase back to LMHF.

*Join us in 2019*

**Walk**

May 11



WALK FOR THE HEALTH OF IT

**Sip**

July 13



MUSIC IN THE VINEYARD  
**SUMMER FEST #35**

**Swing**

Sept. 9



Dr. Russell B. Steele  
**GOLF**  
Tournament

**Call (209) 339-7833 or visit [www.lmhfoundation.org](http://www.lmhfoundation.org)**

# Board Leadership is Crucial to Success

Hospitals play an important role in the community, impacting each of us at some point in our lives. Managing a hospital is a complex and delicate challenge, but funding hospital services is even more challenging. Every hospital relies upon the community for financial support, and this is why hospital foundations are so critical to their success.

In 1980, the Lodi Memorial Hospital Foundation was formed, and since that time it has been governed by a Board of Directors that set policy and direct fundraising efforts to generate support for hospital programs, equipment purchases and other community healthcare needs.

The LMHF Board is comprised of some 20 board members with a variety of backgrounds and experience. The longest-standing member of the Board is Ron Mettler, who joined in 1983. The youngest member is Melissa Phillips-Stroud, who started her first term in 2017.

Each board member serves on either the Finance Committee or the Public Relations Committee. Chairs of those committees, plus the officers of the Foundation,

<u>Member</u>	<u>Position</u>	<u>Occupation</u>	<u>Joined</u>
Mike Georguson	Board Chair	Sign company owner	2006
Trent Diehl	Vice Chair	Attorney	2014
Steve Diede	Secretary	Construction	2002
Marc Bregman	Chief Financial Officer	Insurance	2006
Jeremy Lenser	Finance Chair	Financial planning	2014
Phil Felde	Public Relations Chair	Banking	2017
Randy Snider	Hospital Liaison	Real estate	2003
Rev. Bill Cummins	Hospital Liaison	Ministry	2014
Jan Chandler	Scholarship Co-Chair	Agriculture products	1997
Nancy Watts	Scholarship Co-Chair	Teacher	1998
Sherry Cotta	Board Member	Agriculture	2015
Jerry Hugo	Board Member	Accounting	2004
Frank Sasaki, Jr.	Board Member	Electronics retailer	1999
Melissa Phillips-Stroud	Board Member	Winery	2017
Daniel Wolcott	Board Member	Hospital president	2016
Ben McDonald	Board Member	Attorney	2013
Ron Mettler	Board Member	Banking	1983
Scott Meyer	Board Member	Banking	2016
Dr. Ken Mullen	Board Member	Physician	2011
Dr. AnnieMarie Santos	Board Member	Physician	1999

serve on the Executive Committee, and all board members attend the monthly board meetings. Policies and funding decisions are fully vetted through committees and approved by the full Board.

Hospital funding requests are vetted through the hospital President, and annual funding priorities are established to present to the donor community for support.

Daily operations of the foundation, event organization and fundraising efforts are managed by a permanent staff consisting of the CEO, Events Director and Donor Relations Manager.

LMHF is blessed to have dynamic board members who care deeply about the success and growth of Adventist Health Lodi Memorial and our community.

## Board Member Frank Sasaki Passes



It is with a heavy heart we learned on November 20, 2018, that long-term board member, Frank Sasaki had suddenly passed away. Frank served on the LMHF Board from 1999-2018, only a few months shy of 20 years. During his tenure, Frank served on the Public Relations Committee and guided marketing of our

events and the Foundation. In recent years, Frank was the force that encouraged us to enter the digital age with Facebook and Instagram, and to update our website to the newest platform. Frank was a true philanthropist, always placing others first and was dedicated to improving donor relations. He continued the legacy of his father, who also served on LMHF board from 1989-1998. Thank you, Frank, for your loving heart and faithful service.

# Our Board of Directors



*Mike Georguson,  
Chairman*



*Trent Diehl, Vice  
Chairman*



*Steve Diede,  
Secretary*



*Marc Bregman,  
CFO*



*Jeremy Lenser,  
Finance Chair*



*Phil Felde, Public  
Relations Chair*



*Randy Snider,  
Delegate to AH  
Lodi Memorial*



*Jan Chandler*



*Sherry Cotta*



*Jerry Hugo*



*Ben McDonald*



*Ron Mettler*



*Scott Meyer*



*Kenneth Mullen,  
MD*



*AnnieMarie  
Santos, MD*



*Frank Sasaki*



*Melissa Phillips  
Stroud*



*Nancy Watts*



*Daniel Wolcott,  
CEO, AH Lodi  
Memorial*



*Bill Cummins, AH  
Lodi Memorial  
Board Liaison*



*Wayne Craig,  
President, CEO*



*Carolyn Hoff,  
Events Director/  
Office Manager*



*Elizabeth Cochrane,  
Donor Relations  
Manager*

## Our Mission

*Enhancing the Greater Lodi community's healthcare and healthy living through philanthropy.*

## Our Vision

*To support and promote healthcare; facilitate access to healthcare; advance healthy living; enhance public awareness of Lodi Memorial Hospital Foundation; and fulfill our mission through philanthropic giving, events and donor relations.*

# 2018 Financials

**\$1,093,501**  
Total Gifts



Funds Distributed to Programs

**\$606,984**

**588**  
Total Donors

**867**  
Total Gifts



**230**  
New Donors

2018 Form 990 will be available by request and posted on our website when completed.

## 2015-18 Estate Gifts Pledged

Total Value of Estates Completed	\$34,985,129
Assets Gifted to Family Members and Other Individuals	\$27,107,553
Deferred Gifts to LMHF	\$1,550,869
Deferred Gifts to Other Nonprofits	\$5,653,086
Potential Estate & Income Tax Prior to Planning	\$2,867,780
Potential Estate & Income Tax Owed by Estates after Planning	\$673,621

## What You Funded

Because of our loyal donors, LMHF was able to fund a number of programs and projects supporting AH Lodi Memorial and the Greater Lodi Community. Here is a partial list of those benefiting for the period between 2015-2018:

DaVinci Surgical Robotic Xi .....	<b>\$2,000,000</b>
First Day Capital Campaign (Level II NICU) .....	<b>\$500,000</b>
Final payment on 2008 South Tower Capital Campaign.....	<b>\$388,000</b>
Medical office purchase for future hospital use.....	<b>\$335,000</b>
Academic scholarships .....	<b>\$146,500</b>
In-kind gifts of supplies, equipment or services .....	<b>\$80,000</b>
Dexa Scan Machine .....	<b>\$58,000</b>
Healing Garden Tribute Wall redesign.....	<b>\$40,000</b>
Med-Surg and Surgery pediatric room upgrades .....	<b>\$40,000</b>
Outpatient Physical Therapy equipment.....	<b>\$36,500</b>
Crucial Conversations leadership training...	<b>\$25,000</b>
Neonatal monitors .....	<b>\$24,000</b>
Pediatric fetal heart ECG.....	<b>\$24,000</b>
Walter E. Reiss Outreach Clinic.....	<b>\$20,700</b>
Patient discharge medication program.....	<b>\$20,000</b>
Emergency Department remodel .....	<b>\$18,000</b>
Palliative Care Program .....	<b>\$18,000</b>
Radiation shielding aprons for surgery .....	<b>\$15,000</b>
Adult Day Care .....	<b>\$8,000</b>
Pillow Pets Program.....	<b>\$8,000</b>
Books for Babies.....	<b>\$5,000</b>
Birthing mannequin for delivery-nurse training.....	<b>\$2,000</b>
Cancer Kids of San Joaquin.....	<b>\$1,500</b>
Hispanic health fair of Lodi.....	<b>\$1,000</b>
<b>TOTAL PROGRAM SUPPORT .....</b>	<b>\$3,814,200</b>

# 2018 DONORS

## \$700,000

Estate of Milton & Cora Holstine **L S**

## \$50,000

William Randolph Hearst Foundation **G S**  
Dart Foundation **G S**

## \$10,000-\$25,000

Adventist Health **E A I S**  
Cortopassi Family Foundation **C E S**  
Michael & Lisa Crete **E A S**  
Diède Family **E G M I S S**  
Dr. Carolyn M. Fowle **E M A S**  
Michael David Family Foundation **C E I S**  
Karen & Paul McPherson **C S**  
Jim & Annette Murdaca **G A S**

## \$5,000-\$9,999

Cen-Cal Fire Systems, Inc. **E S**  
Collins Electrical Company, Inc. **E S**  
F&M Bank **E I S**  
John & Edyth Ledbetter **C M S**  
Andy Stephens **E S**  
Vienna Nursing & Rehabilitation **E S**

## \$2,500-\$4,999

American Chiller **E S**  
BAC Community Bank **C A I S**  
E & J Gallo Winery **E A S**  
Fairmont Rehabilitation **E**  
Golden State Restaurant Group **E A S**  
Hibser Yamauchi Architects, Inc. **E**  
Jones Lang Lasalle America, Inc. **E**  
Mercedes Benz of Stockton **C**  
Dennis Morita, CPA **E A S**  
NORCAL Ambulance **E S**  
Valley Outdoor Advertising **E G M A I S**  
Vino Farms, Inc. **E M A S**

## \$1,000-\$2,499

AHLM Vineyard Café **I**  
Bill Baker & Ulla Steele **E**  
Marc & Heather Bregman **E I S**  
Kenneth Campbell **E**  
Janet & Mark Chandler **C E S**  
Joe & Sherry Cotta **E I S**

Shirley Dauer **L S**  
Trent & Kate Diehl **E**  
Phil & Daphne Felde **E M A S**  
Dr. Jack Gilliland **C**  
Dr. Kevin Hilton **I**  
Yoshi Kim **E**  
Kindred Hospice **E**  
Fred Krause **E A**  
Jeremy Lenser **E I**  
Lincoln Square Post Acute **E**  
Lodi Nursing & Rehabilitation **E**  
Lodi Unified School District **E**  
Ben McDonald **E**  
Medline Industries, Inc. **E S**  
Nick & Penny Meyers **E I**  
Network for Good **G**  
Lee Parton **E**  
Christian & Nancy Phillips **G A**  
Dorothy Platt Trust **G A S**  
Suzanne Schultz **E**  
Mona Shulman **G A S**  
Sip Shuttle **I**  
Randy & Jodie Snider **E M S**  
Dennis & Tamara Steinkamp **E**  
Vituity **M T S**  
West-Com TV **E**  
Sheila Wishek **E S**  
Daniel & Cynthia Wolcott **E**  
Woodbridge Golf & Country Club **I**  
Yosemite Pathology **E**

## \$500-\$999

Sheila Ames **E**  
Angelina's **I**  
Angelo's Mexican Restaurant **I**  
Arbor Rehabilitation & Nursing Center **E**  
Bon Appetit **I**  
Bob Carlson **E**  
Darrell & Robin Clay **E I S**  
Liz Cochrane **E G M I**  
Allan B. Corey, DDS **E G**  
Wayne & Diane Craig **E G M S**  
Cut the Mustard **I**  
DeVinci's Deli & Catering **E**  
Katie Drebert **E**  
Edible Arrangements **I**  
Joseph & Gretchen Eger **M**  
Habañero Hots **I**  
Hanot Foundation **E**  
Carolyn Hoff **E G M I S**  
Holt of California **E**  
Jerry & Rilette Hugo **E M I S**  
JSG Trucking Company **A**  
Dr. Gary & Liza Kanemura **E**  
Jeff & Carol Kirst **E S**

David & Patty Kirsten **I S**  
Charlene & Randall Lange **E**  
Lincoln Financial Advisors **E S**  
Lodi Academy **E**  
Lodi Association of Realtors **E S**  
Lodi Community Foundation **E**  
Dr. Tom & Meg McKenzie **E S S**  
John Mercer **T**  
Tina Morgado **E**  
Dr. Ken & Nancy Mullen **E M S**  
Dr. David & Beth Neal **E G**  
Frances Neal **M**  
Steven & Laura Nickel **A**  
Peter Ohm **G**  
Katherine & Ricky Okazaki **E**  
Pacific Coast Producers **E**  
Dr. Daryl & Kathi Payne **E**  
Pepsico **E I**  
Restorix Health **E**  
Rocky Mountain Chocolate Factory **I**  
Cindy Rudow-Smith **T**  
Salisbury's Deli & Grill **I**  
San Joaquin Sulphur **E S**  
Rebecca Sanders **E G**  
Dr. AnnieMarie Santos **E S**  
Valerie Stump & Perinatal Staff **E T**  
Thai Spices Restaurant **I**  
Robert Thompson **E**  
Peter Vanderbloom **E**  
Paul E. Vaz Trucking, Inc. **E G**  
Vitas Healthcare **E**  
David & Sara Walden **M**  
Nancy & Harlin Watts **E G I S**  
Wine & Roses **I**  
Wingstop **I**  
Woman's Club of Lodi **E**  
Zeiter Eye Medical Group **E**

## \$250-\$499

Carl & Ashley Arevalo **E**  
County of San Joaquin **E**  
Pastor Bill Cummins **C E**  
Del Rio Country Club **I**  
Kathy & Jeffrey Cockayne **E G**  
Neal & Kris Colwell **A**  
Delta Eye Medical Group **E**

Dr. Stanley & Beth Demski **E**  
Cecil & Janet Dillon **M S**  
Discovery Bay Country Club **I**  
Encompass **E**  
Exactacator, Inc. **E**  
Angie Ferrero **E M**  
Jeri Fitchette **E**  
Daniel Foster **E**  
Jerry Hearon **E**  
Hollywood Family Café & Catering **I**  
Hospice of SJ Butterfly Auxiliary **G**  
Belinda & Michael Hurst **E**  
Josh Iris **E**  
Ron & Kris Katzakian **G**  
Kurt & Sandra Kautz **E S**  
Kelly Architecture & Planning **E**  
Kids Care Dental & Orthodontics **G**  
Tara Kosel **E**  
LB Production Center **I**  
Phil & Debra Lenser **S**  
Lodi Chamber of Commerce **E**  
Lodi Sunrise Rotary Club **E**  
Maria Mancilla **G**  
Dr. James & Elna McFarland **M**  
Ron & Katherine Mettler **E**  
Scott & Bre Meyer **E**  
Kenneth Mori **E G A**  
Russ & Kathryn Munson **S S**  
Napa Valley Country Club **I**  
Nothing Bundt Cakes **I**  
Now & Zen Yoga Studio **I**  
Dorothy Panella **E**  
Jeffrey C. Payne, DDS **E**  
Saddle Creek Golf Club **I**  
Jean Schultz **A**  
Spring Creek Country Club **I**  
Thelma Stewart **E S**  
Stockton Golf & Country Club **I**  
Melissa & Drew Stroud **E S**  
The Olympic Club **I**  
Tiger Lines Inc. **E**  
Amy Toy **G**  
Chris Wakeman **E**  
Jason & Jenny Whitney **E**  
Betty Williams **E M S**  
Jerry & Norma Workman **M**

### LEGEND

Legacy & Bequests	<b>L</b>	Annual Giving	<b>A</b>
Capital Campaign	<b>C</b>	Tribute Wall Plaques	<b>T</b>
Grants & Donations	<b>G</b>	In-Kind Gifts	<b>I</b>
Events & Sponsorship	<b>E</b>	Artwork Sponsorship	<b>S</b>
Memorials	<b>M</b>	Mullen Society	<b>S</b>

Please contact the Foundation office for corrections to the records.



**Lodi  
Memorial Hospital  
Foundation, Inc.**

845 S. Fairmont Ave., Ste. 3  
Lodi, CA 95240  
(209) 339-7833  
Fax (209) 339-7690  
[www.lmhfoundation.org](http://www.lmhfoundation.org)

## Donor Opportunities and Memberships

There are a number of different ways to support Lodi Memorial Hospital Foundation, and many of our donors participate in multiple programs. Below is a listing of opportunities and donor groups for your consideration. Gifts and memberships are noted in the Annual Report and/or acknowledged online or in print. Many of these gift opportunities are available on our website. Gifts are tax deductible as allowed by law.

For more details, visit our website, [www.lmhfoundation.org](http://www.lmhfoundation.org), or contact Wayne Craig at (209) 339-7630.

### **G Cash Gifts**

Donors may make cash gifts throughout the year. These are received in person, by mail and online. Gifts may be restricted for a specific donor preference use, or unrestricted to be used where need is greatest.

### **A Lifetime Annual Giving Circle**

For those that commit to giving each year.

### **M Memorial Gift Program**

Gifts made periodically to honor a lost friend or relative. Gifts are acknowledged in the Lodi News-Sentinel, and the surviving family is notified of the gift.

### **T Tribute Wall Plaque**

Purchase a bronze plaque for the Tribute Wall in the Healing Garden. Plaques contain your message of appreciation for people, programs, events and scripture.

### **C Campaign Gift**

Gifts made to capital campaigns, like the recent First Day (NICU) and 2019 Catch It Early cancer campaign.

### **E Event Sponsorship**

Sponsor one or more annual events: Walk for the Health of It, SummerFest, Golf Tournament. We have sponsorship opportunities at multiple levels to fit all donor needs.

### **S Artwork Sponsorship**

Gifts made to sponsor artwork displayed in the hospital.

### **I In-Kind Gifts**

LMHF receives donations of supplies, equipment and services from both individuals and companies that support our programs and events. A receipt is sent for each gift.

### **S Mullen Society**

A special membership class of donors that have given \$10,000 or more over time to support LMHF.

### **L Acorns to Oaks (Legacy) Society**

This is a group of donors that have acknowledged a bequest gift to LMHF is included in their estate plan.

### **L Charitable Trusts**

LMHF has a Planned Giving Program, which includes various gift instruments, including Charitable Remainder Trusts. Many of our Acorns to Oaks members have used this vehicle for giving.

### **L Appreciated Property Gifts**

Gifts of real property or appreciated stock are a way to support LMHF and, at the same time, provide tax benefits to the donor.

### **L Insurance Gift**

Designating LMHF as your beneficiary on an insurance policy is a great way to make a larger gift over time. The donor receives the tax deduction, while the Foundation benefits as the policy beneficiary.