

IMPACT



PHILANTHROPY
REPORT
2023

WE ARE GRATEFUL TO YOU

OUR DONORS AND SUPPORTERS—BOTH LARGE AND
SMALL. TOGETHER, WE FORM THE
BEAUTIFUL MOSAIC WE CALL OUR COMMUNITY.
AND TOGETHER WE ARE HEALTHIER, STRONGER AND
BETTER ALL THE TIME.

A Message to Our Community



Over the past year, our caring community came together in new and inspiring ways to achieve our shared vision of a healthier, stronger region. We are grateful for the support of civic and business leaders, patients, employees, regional and local businesses, foundations and corporations. Your generous donations play a vital role at Carilion Clinic. Their impact can be seen across the system—from en-

hanced treatment options and equipment to medical education—and in the lives of our patients and their families.

As the primary leader for building philanthropic relationships, the Carilion Clinic Foundation provides critical funding to support vital, mission-driven services—services that would not otherwise be available in our community. They include:

- Pediatric equipment and patient support
- Medications and other assistance for patients in need
- Educational scholarships for aspiring clinicians

In 2023, our Foundation saw historic growth, largely the result of our \$100 million comprehensive campaign focused on a new Cancer Center. The campaign and other fund-raising efforts have attracted the support of donors from across Virginia and the nation.

Our culture of philanthropy grew internally as well, with record participation in our 2023 Employee Giving Campaign. And school children, youth baseball teams and corporate and community partners continued to make Carilion their charity of choice. In response to our increasing fund-raising activities, we strengthened our Foundation staff and introduced new ways to give. This report on philanthropy at Carilion, our first, is another reflection of our growth.

Your generosity in 2023 made all this and more possible. Through your gifts, we will continue to transform health care for future generations.



Nancy Howell Agee
Chief Executive Officer
Carilion Clinic



Robert G. Bennett
Chairman of the Board
Carilion Clinic Foundation

2023 By the Numbers

The Carilion Clinic Foundation is a 501(c)(3) organization that inspires, seeks, secures and stewards philanthropic resources to enhance care for the patients of Carilion Clinic. The health system pays all administrative expenses, so 100% of every gift goes directly to programs.

\$18.2 million
Total gifts

2,200
Donors

\$80+ million
Total assets

\$585,418
Given by employees

\$36 million
Endowment

93.6%
7-year endowment growth

30
Endowed funds

\$11.4 million
Endowed scholarships

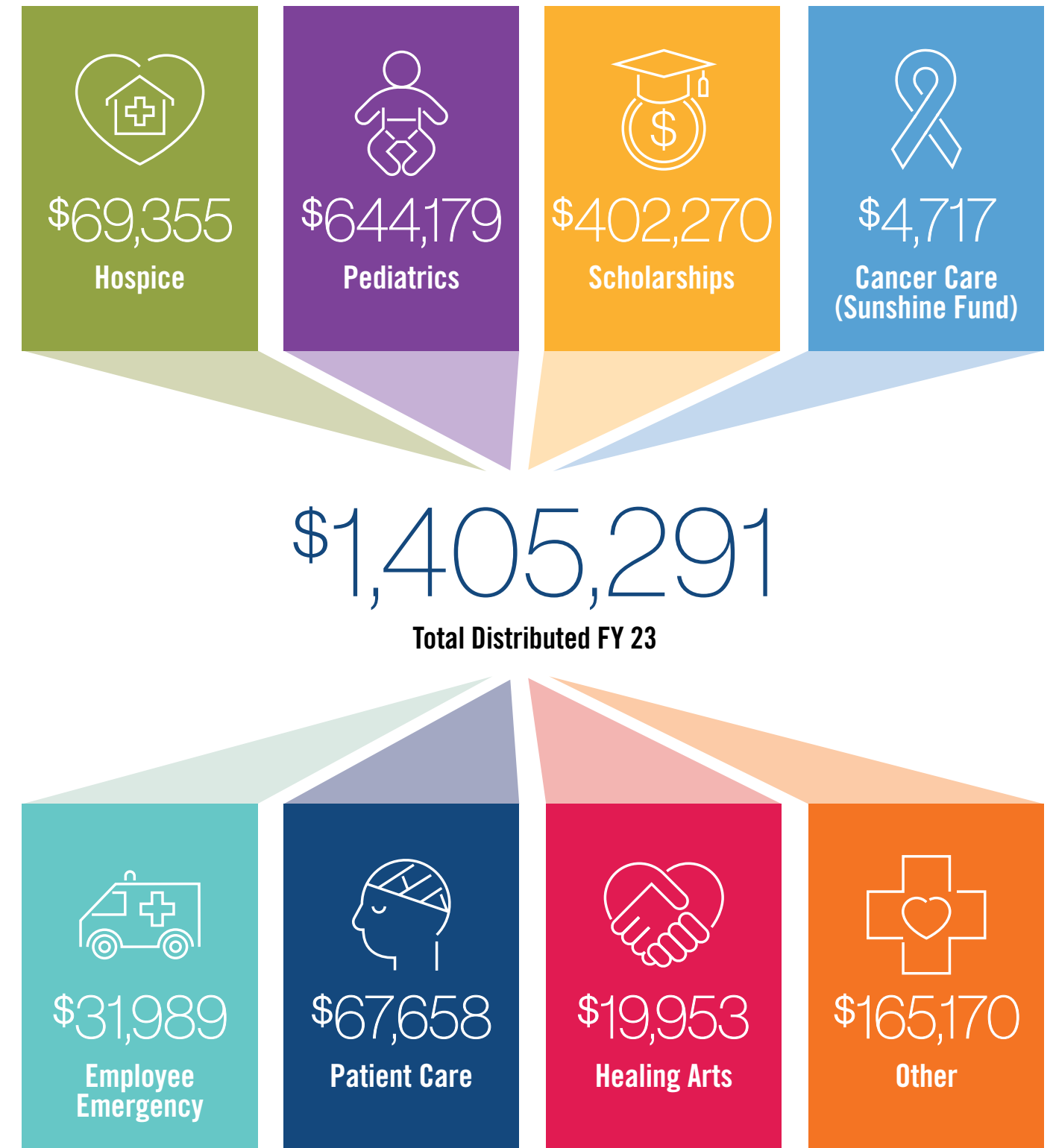
Carilion Clinic Foundation Investment Performance

Annualized returns	1 year	3 years	5 years	10 years
Carilion Clinic Foundation Portfolio	12.2%	8.9%	6.6%	6.6%
Benchmark	12.5%	2.1%	4.3%	5.7%

The above data, as of Sept. 30, 2023, compares the Foundation's return with the blended benchmark return of 60%/40% – MSCI ACWI/Barclays Aggregate.

Our Impact: Snapshot of Gift Distribution

Philanthropic partnerships with our community enhance Carilion Clinic's ability to provide excellence in health care and the patient experience. Here's a snapshot of how your donation in 2023 helped.



PAYING IT FORWARD

The nursing scholarship that sparked Daniel Terrell's love of learning continues to reap benefits.



SPOTLIGHT ON: DANIEL TERRELL, D.N.P.

Daniel Terrell got his first job in health care when he was 22, but it was at age 8 that his career really began.

"I was diagnosed with Type 1 Diabetes, so I kind of grew up in the health system," he says. "The nurses and other staff really led me into nursing."

Although he wasn't able to attend nursing school immediately after graduating Roanoke's William Fleming High School, Terrell held on to his dream while he worked part time waiting tables and, eventually, at Carilion Roanoke Memorial Hospital as a patient transport tech.

In 2012, he became the first in his family to attend college when he entered Jefferson College of Health Sciences, now Radford University Carilion (RUC), to pursue a bachelor's degree in nursing.

"I liked being able to marry what I was learning in school with my role at the hospital," he says.

But working full time while going to school was hard, so when Terrell learned about the Carilion Clinic Foundation's scholarship opportunities, he applied right away.

He recalls vividly the moment he learned he'd been

chosen as the 2014 recipient of the Roanoke Memorial School of Professional Nursing Alumni Association's \$2,000 scholarship.

"My mom and I were jumping up and down. We were crying tears of joy because it really took a load off my shoulders so I could focus full time on school."

Upon earning his B.S.N., Terrell went to work in the hospital's ICU while earning his Nurse Practitioner degree with the support of other scholarships.

"I knew I wanted to do more, to have more autonomy caring for patients."

After completing his N.P. degree, he left the ICU to work in urgent care while he earned a Doctorate of Nursing Practice.

Now a team lead in gastroenterology, he splits his time between administrative tasks, clinical care, precepting students and teaching at RUC.

"Teaching is part of my role as team lead, but it's also something I enjoy," he says. "I want to give back so we can continue to grow the workforce we need," which is precisely the intent of the scholarship.

The RMH School of Professional Nursing, which graduated its last class in 1988, began the program to address the national shortage of nursing professionals.

For his part, Terrell continues to aim high, with the goal of taking on broader leadership responsibilities while he pursues his second doctorate degree and credits the scholarship for setting it all in motion.

"The gift they gave me now gives me the opportunity to help others. Hopefully, that will just keep moving forward."

CALLED TO NURSING
Daniel Terrell, D.N.P., combines his passion for education and clinical care as a team lead in Carilion's gastroenterology section. A scholarship was the catalyst for the career he had always wanted.



2023 Scholarships at a Glance

45

Scholarships

\$402k

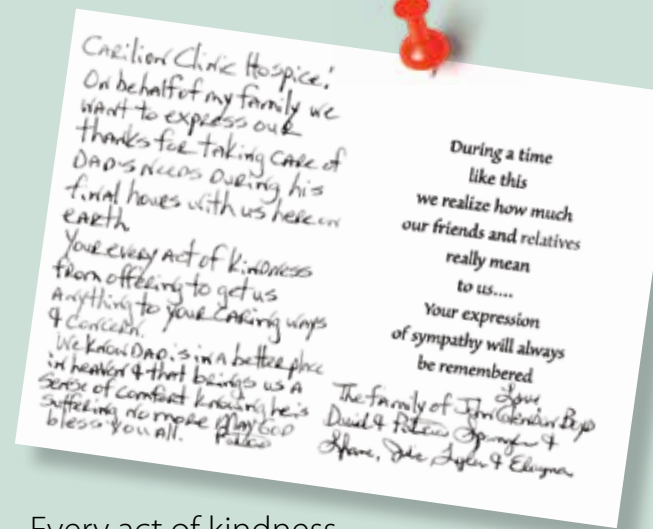
Funding awarded



HOSPICE: GRATEFUL LOVED ONES WRITE IN

A WAY WITH WORDS

Families express heartfelt gratitude for the care their loved ones received from our Hospice staff. Handwritten cards, letters and memorial gifts arrive daily, recounting acts of kindness and caring for patients at the end of life.



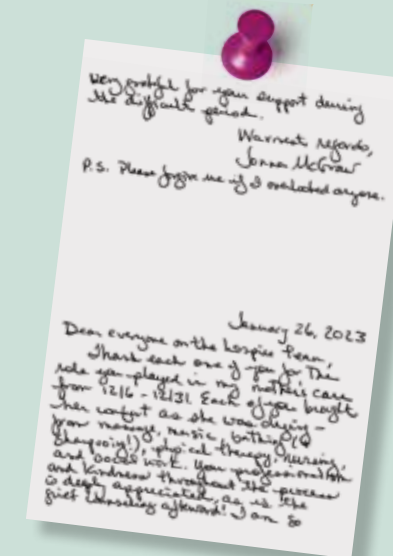
Every act of kindness

On behalf of my family, we want to express our thanks for taking care of Dad's needs during his final hours with us here on Earth. Your every act of kindness from offering to get us anything to your caring ways and concern. We know Dad is in a better place in Heaven and that brings us a sense of comfort knowing he's suffering no more. May God bless you all.



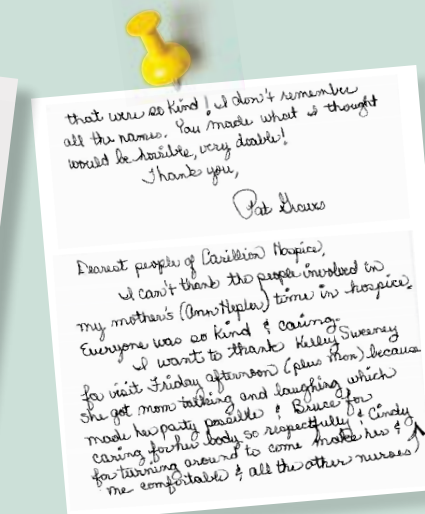
Angels among us

Thanks to all of you...from Marissa to Joelle, Pollyanne, Theresa, Jackie, Sarah, Amy and Cindy. Your kindness will never be forgotten for taking such good care of my mother (Judy Altizer). And especially for helping me out when I felt so helpless. A special thanks to Joelle for being at the funeral. That warmed my heart. You are all truly angels for God.



Each and everyone a comfort

Thank each one of you for the role you played in my mother's care. Each of you brought her comfort as she was dying—from massage, music, bathing (and shampooing!), physical therapy, nursing and social work. Your professionalism and kindness throughout the process is deeply appreciated, as is the grief counseling afterward! I am so very grateful for your support during the difficult period.



TRANSFORMING CANCER CARE

With leadership from our campaign cabinet and visionary donors, a new state-of-the-science Cancer Center will join the rapidly growing community of scientists, researchers, clinicians and students at Carilion's Riverside Center in Roanoke. Look for more information about this exciting project in 2024.

CAMPAIGN CABINET

Honorary Campaign Chairs

The Honorable Steve Agee and
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Cristina and Zach Agee
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and Mrs. Eugenia L. Taubman

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Raymond Smoot
Jon Sweet, M.D.
Jim Thompson
David Wine
Mike Wise*

**For more information,
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President of Philanthropy,
rwalee@carilionclinic.org
or 540-224-4746.

*in memoriam

FAMILY AFFAIR
Child Life specialists' care for young patients often includes siblings who also are affected by their loved ones' diagnoses.



EMPOWERING YOUNG LIVES

Carilion Clinic's Child Life program helps young patients cope with the stress of illness.

"Our specialists
go out of their way to make both patients and their families comfortable."

Entering a health care facility

can be daunting at any age. For children, it can be downright scary.

Instead of returning to an unfamiliar room following her surgery at Carilion Roanoke Memorial Hospital, though, one little girl woke up in her own personal paradise—pink comforter, glitter pillows, stuffed animals and a fuzzy pink robe. Her fairy godmother may not have had wings and a wand, but the team behind the project is no less remarkable.

Carilion Children's Child Life program does more than interior decorating. This team of specialists is dedicated to helping young patients and their families navigate the challenges of illness, treatment and hospitalization.

Using a variety of techniques, specialists also help patients understand their situation in an age-friendly way and distract them when something fearful happens.

"Even a routine visit can be frightening for children. Our specialists go out of their way to make both patients and their families feel comfortable at a time when everything is new and scary," says Heather Kissner, who oversees Carilion Children's six Child Life specialists.

That could mean staging (doctor-approved) "breakouts" during a lengthy hospital stay, throwing end-of-chemo and birthday celebrations or connecting children with others who have experienced similar illnesses or injuries.

The Child Life program humanizes the care experience and enhances medical treatment by reducing stress and anxiety, which research shows contributes to faster healing and better outcomes.

The program is possible in large part thanks to the Barnhart Endowment fund established by Roanoke pediatrician Ruth Barnhart after her death in 1999. With a permanently restricted principle gift of nearly \$12 million, the Barnhart fund pays the Child Life specialists' salaries as well as for many of the materials they use in their day-to-day activities.

The program receives additional support through donations to Carilion Children's.

The Child Life program, which serves several inpatient units at both Carilion Roanoke Community and Carilion Roanoke Memorial hospitals, in 2023 expanded to Carilion Children's Tanglewood Center.



Her Gift to Kids



Dr. Ruth Barnhart's commitment to helping children began when she herself was a child.

Growing up in the early 1900s in Oswego, New York, she donated the proceeds from her lemonade stand to the local hospital to "buy something for the babies."

Years later, after completing medical school, she became the first female pediatrician in Roanoke, where she treated children for 36 years. Throughout the 1950s, she also volunteered her time to conduct pre-school health checkups and responded to the polio epidemic by administering the Salk vaccine in school clinics.

Dr. Barnhart died in 1999 at the age of 97. In a *Roanoke Times* article following her death, colleagues described her as "the epitome of a fine lady who still used linen handkerchiefs" and always drove a Cadillac.

Her commitment to our region's children lives on through a neonatal-pediatric endowment fund established after her death through the Carilion Clinic Foundation.

In good company

Children's Miracle Network (CMN) partners with businesses and organizations to support local fund-raising campaigns for medical care, equipment and therapy programs that save and improve the lives of children in our area. CMN's corporate partners include:

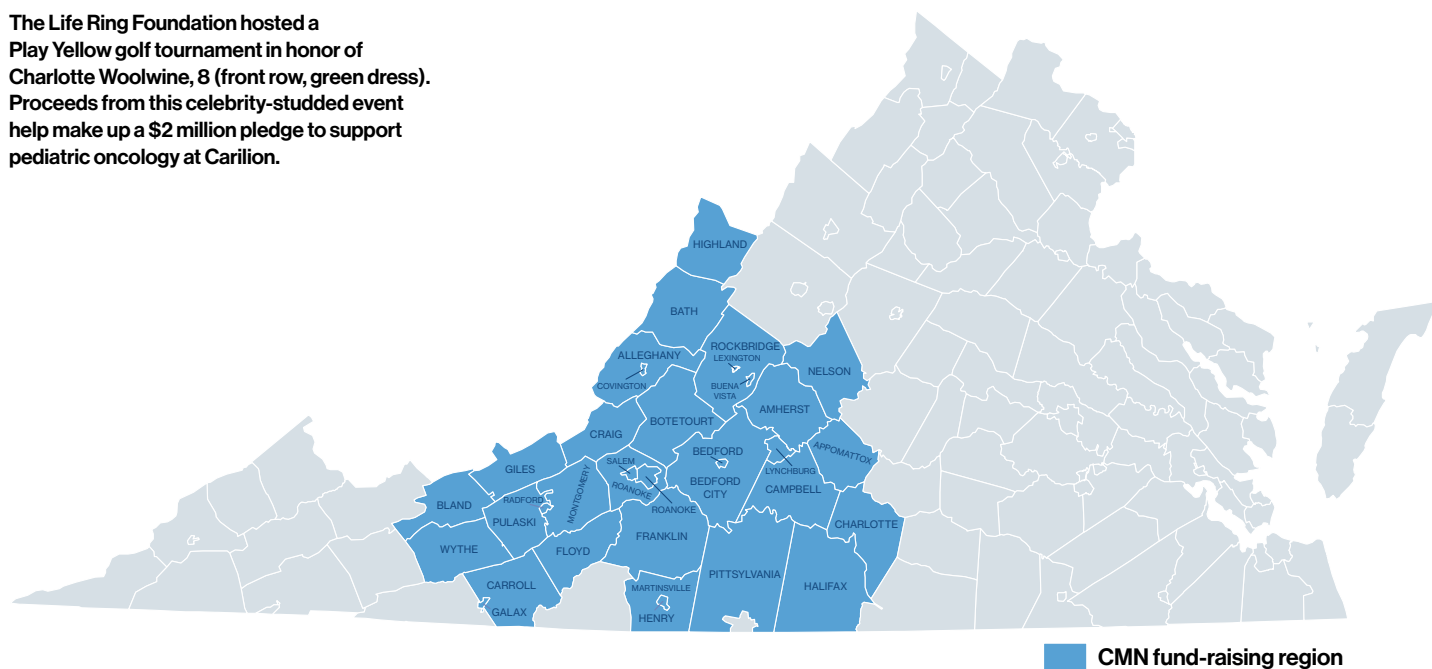
- 7-Eleven
- Ace Hardware
- Credit Unions for Kids
- Dairy Queen
- Joann Stores
- Love's Travel Stops
- Ollie's Bargain Outlet
- Panda Express
- Re/Max
- Speedway
- Valvoline
- Walmart/Sam's Club



The Life Ring Foundation hosted a Play Yellow golf tournament in honor of Charlotte Woolwine, 8 (front row, green dress). Proceeds from this celebrity-studded event help make up a \$2 million pledge to support pediatric oncology at Carilion.

MY, HOW WE'VE GROWN

Carilion Children's is the sole beneficiary of Children's Miracle Network (CMN) fundraising in our region, which expanded substantially last year. In addition to southwest Virginia, the CMN region from which Carilion benefits now includes central Virginia—more than doubling the impact of CMN gifts. CMN is a non-profit organization that raises funds for children's hospitals across North America and provides ongoing annual support for a range of programs that benefit children here.



MIRACLE CHILD
Meg Burrow, CMN
of Southwest Virginia's
Champion of 2023,
receives care at Carilion
Children's for a rare
genetic condition.



2023 CMN at a Glance

63% | \$1.3m

Increase in donations | Funds raised

HONORING A LIFE WELL LIVED

Bruce Thomas remembers his late wife with a planned gift to improve cancer care.



SPOTLIGHT ON: BRUCE THOMAS, M.D.

Nancye “LuLu” and Bruce Thomas enjoyed a decades-long marriage filled with travel. The couple visited China and Antarctica, rode camels and cruised the world’s oceans until 1999, when LuLu began experiencing serious health issues due to cancer treatment she received as a teenager.

Although their destinations became closer to home, they were no less exotic, as LuLu’s care required multiple medical specialists working in close coordination. Through her many years of treatment, LuLu’s warmth and infectious smile never faded and she and Bruce remained a team on this unforeseen life’s journey.

“We were fortunate that she was able to receive most of her care here,” says Bruce, a retired interventional radiologist who spent the majority of his career in Roanoke, including a stint at Carilion Clinic. “It’s a real benefit to live in a community with good medical care, when you face a serious illness.”

When LuLu passed away in 2019, he sought a meaningful way to honor her memory.

“Roanoke has been really good to me. Because LuLu experienced so many medical issues in her life, I thought the best way to honor her would be through a local organization that helped her,” he says.

Inspired by Carilion’s plans for a new Cancer Center, Bruce reached out to the health system’s Foundation, which turned out to be “a perfect match” for what he wanted to do.

“What better way to honor my wife than to do something to help other people battling disease in our community and surrounding communities?” he says.

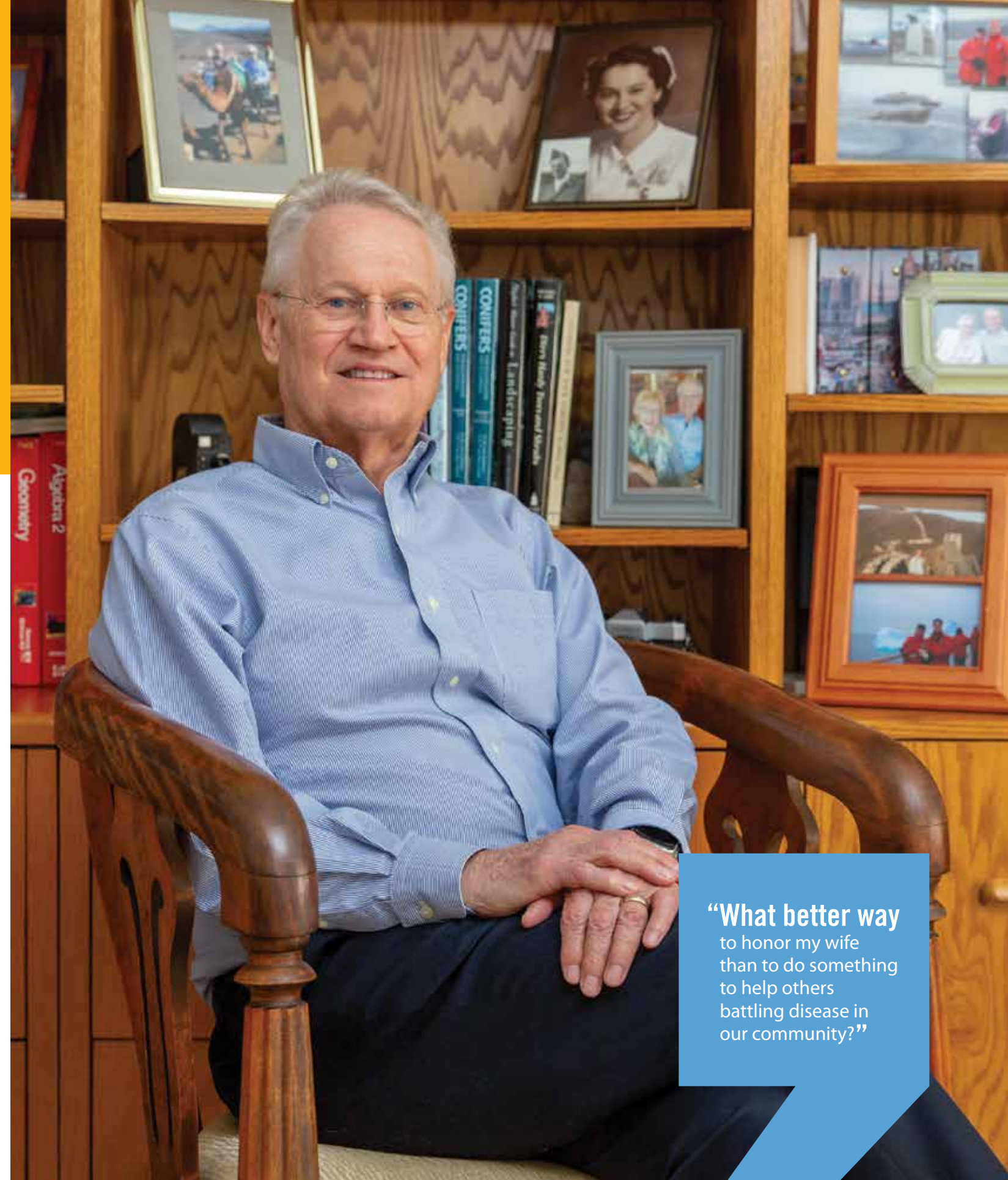
After considering his options, Bruce decided to pair an immediate donation of \$250,000 with a larger planned gift of \$500,000.

Planned gifts, unlike outright cash gifts or pledges, are made through a donor’s estate. They may take the form of charitable gift annuities, gifts through an IRA, wills and living trusts, or other financial instruments.

“Planned giving is a great way for people to express their support, especially through less conventional means, and leave a legacy tomorrow for those they care about today,” says Taylor Adkins, director of philanthropy.

“Bruce saw planned giving as a way to enhance the impact of his gift and make a larger impact on the health of our community.”

RIGHT: Inspired by his late wife’s battles with cancer, Bruce Thomas, M.D., donated and made a planned gift in her memory to support Carilion Clinic’s new Cancer Center.



“What better way to honor my wife than to do something to help others battling disease in our community?”

Every Gift Matters

Whether from young philanthropists, established donors or corporate partners, every gift—no matter the size—made a meaningful difference.

CMN Radiothon

94.1 Star Country, hosted by Brett Sharp and Taylor Sherrill, raised \$163,396 for Children's Miracle Network during their 2023 Cure Kids Cancer Radiothon, surpassing last year's \$150,000.



5K on the ROA Runway

The second annual 5K on the ROA Runway took place at the Roanoke-Blacksburg Regional Airport. The race attracted 220 participants and raised \$30,000 for Carilion's new Cancer Center.



Comic Con for Kids

Children's Miracle Network hosted a table at Big Lick Comic Con, selling bracelets and chances to spin a prize wheel. They raised \$3,422 for Carilion Children's.



Guns & Hoses

Local firefighters and police officers chose Carilion Children's pediatric oncology as the beneficiary of their annual Guns & Hoses charity ice hockey game after learning about a young hockey player's cancer diagnosis.



Delta Dental Signs

The Delta Dental of Virginia Foundation made a \$2 million gift to establish a pediatric dentistry residency at Carilion within our Tanglewood dental clinic.



Roll Over Cancer

Roll Over Cancer, a local charity of cycling enthusiasts founded by a cancer patient and his oncologist, hosted its annual bike ride at Chaos Mountain Brewing. They raised \$4,261, which was donated to Carilion's Cancer Center fund.



YES Program

The Truist Foundation granted \$50,000 to support the expansion of our YES workforce training program. This grant advances our shared goal of providing pathways to economic mobility.



Speedy Bears

The Martinsville Speedway gave away 40 "Speedy Bears" to patients at Carilion Children's Tanglewood Center. The donation also included coloring books and games provided by the NASCAR Foundation.

CARILION CLINIC FOUNDATION

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TOGETHER
HEALTHIER, STRONGER,
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