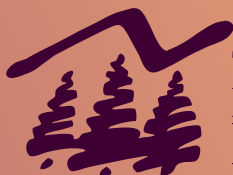


STEWARDSHIP REPORT

2023

EXCELLENCE. COMPASSION. IMPACT.



TAHOE FOREST  
HEALTH SYSTEM  
FOUNDATION

“ ”

*I love to build things that will carry on.*

**RICHARD ‘DICK’ JOSEPH**

*Reflecting*

**ON THE POWER OF**

*Philanthropy*



Access to local healthcare is vital. During the 1920's, when Truckee's closest medical facility necessitated travel, a community member experienced a life-threatening emergency. The need to get from a remote Sierra town to an entirely different region for essential care was sadly consequential for Dick Joseph, whose wife lost her life the day after giving birth to their twin daughters. Not wanting another family to experience such profound loss due to distance, Mr. Joseph was inspired to donate the land upon which Tahoe Forest Hospital now resides. His family has continued to give generously over the last century, providing Tahoe Forest Health System with opportunities to build a robust and comprehensive healthcare organization.

TFHS was founded on the philosophy of philanthropy. Our not-for-profit organization continues to honor the legacy of the Joseph Family by providing critical healthcare, right here at home. As TFHS celebrates its 75th Anniversary this year, it is more important than ever for the Foundation to recognize its committed donors for the essential role they have played in the achievements of our Health System. Our team remains dedicated to supporting the lifesaving work of our Health System. Collaborating with community members to help provide technologically advanced equipment and enhance patient services is at the heart of everything we do. Thank you for supporting our transformative work.



# Getting TO Know

## THE TAHOE FOREST HEALTH SYSTEM

### Who is Tahoe Forest Health System?

The vision for the Tahoe Forest Health System is simple: to be the best rural healthcare organization in the nation. Our not-for-profit healthcare district serves over five counties. We are a designated UC Davis Rural Center for Excellence, recognized for our commitment to providing top quality care for our community members. We are also a proud affiliate of the UC Davis Comprehensive Cancer Center, a network that unites five hospital-based Cancer Centers dedicated to providing exceptional cancer treatment in rural settings. Our goal is to guarantee comprehensive healthcare for our region.

### Tahoe Forest Health System's Commitment to Competitive Healthcare Pricing

The Tahoe Forest Health System is a freestanding, rural health care system that provides a core service to our community, and is independent from larger, more costly health care organizations. No patient is precluded from receiving services, regardless of insurance status. Our commitment to serving every person in our region is unwavering.

Tahoe Forest Health System has covered **\$104 Million** in patient charity care over the last **8 Years**



# Getting TO Know

## THE TAHOE FOREST HEALTH SYSTEM

### Tahoe Forest Health System Reinvests

Despite operating at a higher than average cost-of-living index compared to the rest of California — which increases construction and labor costs — we are committed to reinvesting in the communities we serve by expanding medical office space, technology, and patient parking. In addition, TFHS is dedicated to expanding its medical staff. Today, we have 220 clinical providers serving our community. Meeting the needs of our growing population continues to be a key priority.



Tahoe Forest Health System has invested **\$150 Million** in building space and state-of-the-art equipment for our patients over the last **8 Years**



Tahoe Forest Health System was founded on the philosophy of philanthropy, when the Joseph Family donated the land upon which Tahoe Forest Hospital resides.

**TFHS is celebrating its 75<sup>th</sup> Anniversary in 2024!**



# *Your* TAHOE FOREST HEALTH SYSTEM FOUNDATION

## Who is Tahoe Forest Health System Foundation?

The Tahoe Forest Health System Foundation is the charitable arm of our organization, dedicated to channeling contributions from our community members into investments that support essential healthcare for all residents. The Foundation is committed to supporting renowned healthcare services with state-of-the-art equipment critical to comprehensive hospital operations, and ensuring that the public has continued access to high quality care.

## Expanding Philanthropic Support

The Tahoe Forest Health System Foundation Board of Directors and staff are dedicated to building lasting relationships with our current and prospective donors. Our mutual pledge to advance Tahoe Forest Health System's commitment to the health and wellness of every person in our community takes precedence. There are many ways for donors to give, and they can do so in a way that aligns with their charitable giving goal.

## The Impact of Your Gift

The Tahoe Forest Health System Foundation utilizes gifts from donors to enhance the patient care experience. By supporting the Foundation, our donors make a substantial impact in helping maintain the excellent level of patient care services. Charitable gifts allow our Hospital to remain a thriving and vital community resource. The Foundation's important work guarantees that exceptional, local healthcare will always exist in the Tahoe Truckee community.

**100% of Every Dollar given to the  
Tahoe Forest Health System Foundation  
goes to the area of support Designated  
by the Donor**



# DID *You* KNOW?

With help from our generous community of donors, the Tahoe Forest Health System Foundation was able to elevate patient care by purchasing and committing to fund the following lifesaving initiatives.



**\$500,000** was designated from the **TFHS Foundation's Area of Greatest Need** by our Board of Directors to support the new **3T MRI** project for **Tahoe Forest Hospital's Diagnostic Imaging Department**



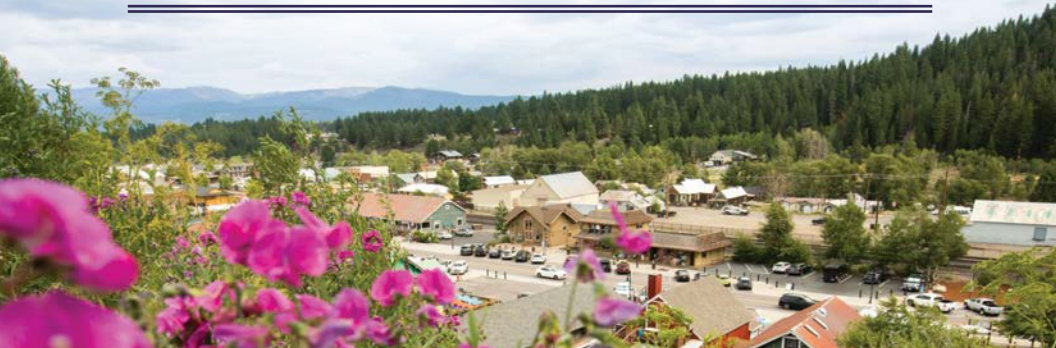
The **TFHS Foundation** has funded over **\$90,000** towards **Oncology Support** for cancer-specific support programs such as **general support groups, Exercise for Energy, massage therapy, acupuncture,** and much more. All programs concentrate on a whole-person approach to healing and come at no cost to the patient.



The **TFHS Foundation** received **\$306,338.84** in federal grant funding from HRSA for the enhancement of **Behavioral Health Services** for Tahoe Truckee community members. In addition to that **\$70,180.75** was raised for **Behavioral Health** outside of the HRSA grant.



In 2023, Tahoe Forest Health System Foundation received **\$962,846** from nearly **800** unique and generous donors.



# YOUR *Gift* AT WORK

Your generosity and continued support positively affects the quality of healthcare offered in our community. Tahoe Forest Health System provides exceptional patient care to residents, seasonal homeowners, and High Sierra visitors in many significant ways.

## In 2023 at Tahoe Forest Health System, there were:



166,290

**Tahoe Forest Health System Clinic** visits by adult, child, and infant patients



14,370

**Orthopedic Clinic** patient visits



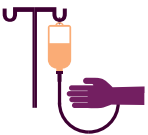
13,289

**Diagnostic Imaging** procedures performed by skilled technicians at the Tahoe Forest Hospital



12,441

**Emergency Room** visits by community members needing immediate, compassionate care



3,588

**Gene Upshaw Memorial Tahoe Forest Cancer Center** patient visits with compassion at our state-of-the-art facility



365

Babies born at our **Joseph Family Center for Women and Newborn Care**



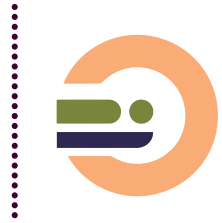
# CHOOSE *Your* AREA OF IMPACT

There are a variety of ways for you to support the Tahoe Forest Health System. Every gift benefits the welfare of those in our Tahoe Truckee community. Each donation goes directly toward the Health System's projects and programs that YOU care about. If you are interested in contributing to the Foundation today, please read on to learn more about your giving options.

## Area of Greatest Need

When you designate your gift to Area of Greatest Need, the Foundation Board of Directors will direct your donation toward the Hospital's most significant need. In our undertaking to offer the best patient care experience possible, having access to comprehensive services and programs, as well as state-of-the-art technology and diagnostic equipment, is a vital necessity.

Recently, the Tahoe Forest Health System Foundation provided **\$500,000** in funding for the new **3T MRI** for the Hospital's **Diagnostic Imaging Department**



## Gene Upshaw Memorial Tahoe Forest Cancer Center

The Gene Upshaw Memorial Tahoe Forest Cancer Center offers unmatched cancer care, equipment, and technology on par with most urban health care systems. They provide medical evaluation, diagnosis, treatment, PET/CT scans, ultrasound, digital mammography, chemotherapy infusion, and pharmacy/lab services. Additionally, physical therapy, family support programs, and psychosocial services are also offered. Gifts to the Cancer Center support further enhancement of services and the advancement of specialized equipment, both of which have a profound impact on the lives of our patients.

## Emergency Department

The Tahoe Forest Health System Emergency Room is a full-service emergency department. Gifts to Emergency Services directly supports equipment and supply needs that assist with the functionality of the department. This crucial technology is more important than ever for our Level 3 Trauma Center.



The Tahoe Forest Emergency Room  
is **Open 24 Hours a Day,**  
**7 Days a Week**



TAHOE FOREST  
HEALTH SYSTEM  
FOUNDATION

- **Gifts of Cash**

Gifts of cash, by check, or credit card are the most direct ways to give to TFHS Foundation. As a not-for-profit 501(c)(3) organization, your gift is tax deductible to the full extent allowed by law.

- **Gifts of Securities**

After being held for a minimum of one year, stock that has increased in value is one of the most popular assets used for charitable giving. Donating appreciated securities is a simple gift that can offer a greater tax benefit than an equivalent in cash. Using appreciated securities entitles you to a charitable deduction for the fair market value of the donated asset, and you avoid paying the capital gains tax you would pay if you sold the appreciated securities.

- **Gifts From a Retirement Plan**

If you are required to take a minimum distribution from a retirement account, a Qualified Charitable Distribution can be made from an IRA to the TFHS Foundation. This will allow you to lower your gross income and possibly reduce your income or estate tax by transferring the additional taxable income to TFHS Foundation.

- **Gifts From a Donor Advised Fund**

A Donor Advised Fund, or DAF, is like a charitable investment account. You are generally eligible to take an immediate tax deduction when you contribute assets from a DAF. You can recommend grants to TFHS Foundation from this type of tax-free investment fund.

- **Gift From a Matching Gift Program**

Double your donation to TFHS Foundation. Many employers sponsor matching gift programs that will match charitable contributions made by their employees. The match ratio is often 1:1, so by taking advantage of such a program, you can effectively double the impact of your gift.





# GIVING *Tomorrow*

If you are interested in supporting the long-term vision of the Health System, you can make a plan to give a gift to TFHS Foundation in the future so that we can continue to provide life-saving services for all community members. There are numerous estate planning techniques available that can maximize your testamentary charitable gifting and mitigate tax exposure. Please consult your tax advisor or estate planner for more information about tax deductions for charitable donations, and review a few of the options below:

- **Will or Trust Bequests**

These gifts are made by including a provision in your will or trust document. TFHS Foundation receives your gift after your passing, at which time your estate can take the income and estate tax deductions.

- **Charitable Lead Trust**

A charitable lead trust would pay TFHS Foundation for a certain number of years, after which the trust principal will pass back to you, your family members, or other heirs. It can be an excellent estate planning vehicle if you own assets that you expect will substantially appreciate in value. It can help you keep an asset in the family while enjoying some tax benefits.

- **Charitable Remainder Trust**

A charitable remainder trust is the mirror image of the charitable lead trust. Trust income is payable to you, your family members, or other heirs for a period of years, then the principal would come to TFHS Foundation. A charitable remainder trust can be beneficial because it provides you with a stream of current income.

Donors who notify the Foundation of their intent to include TFHS Foundation in their will or trust are instated as a ***TFHSF Legacy Partner in Health*** member. The Foundation would like to thank and recognize (based on donor preference) supporters for their intention to give while they are still living.

*Scan me!*



Make a life-saving gift to the  
Tahoe Forest Health System Foundation *Today!*

*Tahoe Forest Health System Foundation*  
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