

STEWARDSHIP REPORT

# 2024



TAHOE FOREST  
HEALTH SYSTEM FOUNDATION

*Excellence. Compassion. Impact.*





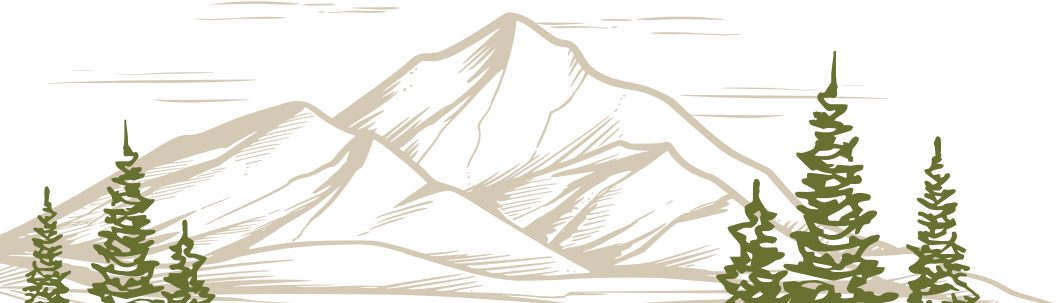


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Honoring our past,  
shaping our future

*through philanthropy*

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Last year, we proudly celebrated the 75<sup>th</sup> anniversary of Tahoe Forest Health System, reflecting on the tremendous impact our community's generosity has had on local healthcare. As a not-for-profit health system, we rely on the support of donors like you to advance our mission and ensure that exceptional care remains available to all who call this region home. With your continued dedication, we are ready to embrace the next initiative that will shape the future of our health system for generations to come.

Access to quality healthcare close to home remains as critical as ever.

The future of Tahoe Forest Health System holds exciting possibilities, as we expand our services, enhance our capabilities, and invest in state-of-the-art medical technology. As a community-supported organization, every gift we receive goes directly toward improving patient care, strengthening our programs, and meeting the evolving healthcare needs of our growing region.

We are deeply grateful for the ongoing commitment of our donors, whose generosity empowers us to elevate the standard of care and create lasting change. Your support makes a difference every day, and together, we will continue to ensure that high-quality healthcare thrives right here in our mountain town. Thank you for being an essential part of this transformative journey — we look forward to all that we will accomplish together in the years to come.



*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 **\$111.8 Million** in patient charity care over the last **9 Years**





## 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 **\$166.3 Million** in building space and state-of-the-art equipment for our patients over the last **9 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.*



# *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

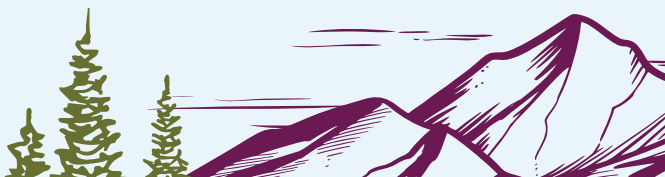
The Tahoe Forest Health System Foundation Board of Directors and staff are dedicated to building lasting relationships with our current and prospective donors. Our mutual pledge to advance Tahoe Forest Health System's commitment to the health and wellness of every person in our community takes precedence. 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**



# Your GIFTS AT WORK

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.

## Highlights:



The TFHS Foundation purchased **VICTORIA S220**, a lifelike childbirth simulator, through a **\$60,000** grant from the **Martis Camp Foundation** and staff contributions through the Team Member Giving program. This advanced tool supports realistic obstetric emergency training to improve care for mothers and babies.



The TFHS Foundation designated **\$100,000** from past Gift Tree proceeds launched the **Patient Care Enhancement Program**, funding department needs under \$5,000. The first purchase was a blanket warmer for the ski clinic.



During the 75<sup>th</sup> Anniversary Celebration, the Foundation raised over **\$200,000** for the **Area of Greatest Need** fund, with \$100,000 designated for new fetal monitors at the Joseph Family Center for Women and Newborn Care.



The TFHS Foundation has funded **\$125,000** in FY24 towards **Oncology Support Services** 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 has received **\$769,799** in private and public grant funding for the enhancement of **Behavioral Health** and **Cancer Center** services.

In 2024, Tahoe Forest Health System Foundation received **\$3,701,698 Million** from nearly **934** unique and generous donors

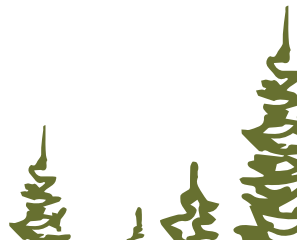




## *Update:* **COMMUNITY for CANCER CENTER ENDOWMENT**

Formed in 2006 by nineteen dedicated community volunteers, the Cancer Advisory Council played a vital role in shaping local cancer care through fundraising, advocacy, and program development. Their efforts contributed to the establishment of the Community for Cancer Care Endowment (C4CC) in 2010 and the opening of the Gene Upshaw Memorial Tahoe Forest Cancer Center in 2012. Today, the TFHSF continues to steward this fund, ensuring ongoing support for patient and family programs, cutting-edge oncology equipment, and top-tier cancer care in our community.

The Community for Cancer Care Endowment (C4CC) is made up of three separate endowment funds: General, Patient and Family Cancer Care Program, and Sustainability. The general endowment includes programs to be determined over time that support cancer services within the Cancer Center. The Patient and Family Cancer Care Program is what we now know as the Oncology Support Services program, which focuses on a whole person approach to cancer care, addressing the social, psychological, emotional, and functional aspects of a patient and caregiver's experience. Lastly, the Sustainability endowment supports oncology services to attract and retain cancer care clinicians and oncology equipment to support the Cancer Center.





The endowment funds are managed by the Tahoe Truckee Community Foundation (TTCF), which provides quarterly financial reports to the Tahoe Forest Health System Foundation for review.

In 2024, the Foundation received a remarkable \$1 million gift designated for the Gene Upshaw Memorial Tahoe Forest Cancer Center. This generous donation ensures that funds within the endowment can continue to compound over the years, supporting long-term sustainability and reducing the need to draw on the principal. As a result of these efforts, no funds have been withdrawn from the Community for Cancer Care Endowment since its inception in 2010. This success is a direct result of our commitment to managing and preserving the fund, guaranteeing that essential Oncology Support Services will continue to be provided at no cost to patients and their families.

As of the latest report from the Tahoe Truckee Community Foundation (TTCF) as of December 31, 2024, the endowment fund balances were:

- Tahoe Forest Cancer Care General Fund (TFCCGF) **\$959,472**
- Tahoe Forest Cancer Care Patient & Family Fund (TFCCPF) **\$497,277**
- Tahoe Forest Cancer Care Sustainability Fund (TFCCSF) **\$167,900**

The current amount in the endowment funds therefore are **\$1,624,649**.



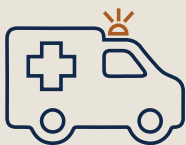
# CHOOSE YOUR *Area of Impact*

## Area of Greatest Need

When you designate your gift to Area of Greatest Need, the Foundation Board of Directors will direct your donation towards 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.

## 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**

## 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, Oncology Support Services provide cancer patients, their families and caregivers with no-cost care that addresses their social, psychological, emotional, and functional needs throughout a patient's therapeutic journey, enhancing the quality their quality of life. 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.



## Hospice

Tahoe Forest Hospice is a specialized program that offers skilled comfort care for patients who are facing the end of life. Our mission is to enhance the quality of life, help preserve personal dignity, provide effective pain and symptom management, and support patients and their families physically, emotionally, and spiritually. Gifts to Hospice support family and caregiver support resources and further enhancement of end-of-life care services.

## Joseph Family Center for Women and Newborn Care

The Joseph Family Center for Women and Newborn Care offers comprehensive obstetrical and gynecological care with a family-centered focus and individualized support services. The Obstetrics department has earned national recognition, including the Women's Choice Award for being one of the best hospitals for obstetrics, and is dedicated to supporting mothers through the Baby-Friendly certification by implementing the ten steps to successful breastfeeding. Renowned for its commitment to excellence, the center provides the highest quality care for mothers and their newborns. Gifts to the Joseph Family Center for Women and Newborn Care help enhance services and fund specialized equipment, ensuring exceptional care for growing families.





# GIVING *Today*

- **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.

Nonprofit Tax ID Number: 94-3047869

- **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. This can even include donations of real property.

## • 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.

*Donate Now!*



## LEGACY PARTNER in HEALTH *Program*

Leaving a legacy is one of the most impactful ways to shape the future of healthcare in our community. Through our TFHSF Legacy Partner in Health program, you have the opportunity to ensure that future generations continue to have access to exceptional medical care by including Tahoe Forest Health System Foundation in your estate plans. Whether through a bequest, charitable trust, or other planned giving options, your generosity will provide vital resources to sustain and enhance patient care, medical advancements, and innovative programs for years to come. Your legacy can make a difference in shaping the future of healthcare.

Donors who inform the Foundation of their intention to include the TFHS Foundation in their will or trust will be honored as a TFHSF Legacy Partner in Health member. We are grateful to recognize (based on donor preference) supporters for their intention to give while they are still living.

In partnership with Thompson & Associates, the TFHS Foundation is pleased to offer complimentary estate planning services for our donors. Thompson & Associates provides expert guidance on estate planning, charitable giving, tax-efficient strategies, and legacy planning, ensuring your wishes are fulfilled while benefiting the causes that matter most to you. A consultant will be available on-site monthly, starting in August 2025, to conduct confidential meetings. If you are interested in utilizing these resources, please reach out to the Foundation.

In 2024, a **Generous Donor** left their home and its contents to the TFHS Foundation, resulting in a **\$1.2 Million** after the property's sale.



*This highlights how gifts of real estate can provide a significant and lasting impact on our mission after one's passing.*



# 2024: YEAR IN REVIEW

In 2024 at Tahoe Forest Health System, there were:



**193,675**

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



**14,362**

**Orthopedic Clinic** patient visits



**14,064**

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



**12,346**

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



**3,678**

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



**624**

**Level 3 Trauma** patients received expert, timely  
care in our Emergency Department when they  
needed it most



**387**

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

# Make a life-saving gift to the Tahoe Forest Health System Foundation

## Today!

### Tahoe Forest Health System Foundation BOARD *of* DIRECTORS

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Anna M. Roth, *RN, MSN, MPH, TFHS CEO*

Breck Overall, *Chair*

Alan Kern

Alicia Barr

Sandra Cath

Scott Wessel

Lauren Lessard, *Ph.D.*

Michael McGarry, *Ex Officio Member*

## Donate Now!



TAHOE FOREST  
HEALTH SYSTEM FOUNDATION

P.O. Box 2508, Truckee, CA 96160 | (530) 582-6277 | [tfhd.com/giving](https://tfhd.com/giving)

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