A sense of belonging
Twenty years ago, the leaders of Charlton Memorial, St. Luke’s and Tobey hospitals decided they could better serve their communities together than apart, and a bold plan was set into motion. The three hospitals executed a full-asset merger with a resulting organization known as Southcoast Health System.

In fiscal year 2016, we saluted those visionaries who made the bold assertion that our communities deserved the very best medical care, close to home. We remain guided by those values and bolstered by you, our donors, whose unwavering support has enabled us to bring ever-improving care to our region. In just two years, $15 million has been contributed to the Campaign for Southcoast Health toward our goal of $25 million, giving us the confidence to look ahead just as boldly as our founders did two decades ago.

Last year was pivotal for Southcoast Health, as important as its founding year and one of the most important years in its history. In 2015, we capitalized on years of hard work, strategic investment and a willingness to seize opportunities in order to fulfill our mission of improving the health and well-being of individuals in the communities we serve.

Previously, our substantial strategic investments in technology, facilities and world-class medical personnel stretched our budgets, but last year we realized the financial gain that we knew would come. We turned a $30 million operating loss in fiscal year 2014 into a $5 million surplus in fiscal year 2015. And, we achieved this financial milestone while continuing to invest strategically and cope with lower reimbursement rates.
The financials, however, do not fully tell the Southcoast story. We have responded to changes in the healthcare environment as they were happening, transforming Southcoast from a hospital-centric system with a focus on illness to a healthcare leader that emphasizes wellness, with care delivered in urgent care centers, outpatient surgery centers, the VNA and a growing roster of primary care and specialist offices.

In 2008, Southcoast employed 38 physicians. Today, we have 318 physicians and 173 advanced practice clinicians. In 2012, 60 percent of our revenue came from inpatient hospital care and 40 percent from outpatient services. Today, the revenue picture is the exact opposite. We have completely transformed our business model — something that will take other health systems years and even decades to accomplish.

Every day, we perform miracles of advanced procedures and techniques that greatly reduce recovery times and the risk of potential complications — and change lives. We offer minimally-invasive cardiovascular procedures that are not yet available at many other hospitals in Massachusetts. And we are one of only a handful of hospitals in New England that implant the Watchman Device for atrial fibrillation (A-fib) patients, reducing the risk of stroke and allowing patients to stop taking blood thinners. Care options such as these will only increase with the introduction of the Harold and Virginia Lash Heart and Vascular Center, which we opened in October 2015 at Charlton Memorial Hospital. It is the future of advanced cardiac care in our region — and anywhere.

Southcoast delivers exceptional care at every stage of life. Last year, we cut the ribbon on the new $14 million Stoico/FIRSTFED Maternity Center at St. Luke’s Hospital, where mothers can welcome their infants surrounded by family in a comforting and restful environment. If a complication arises, we have Level II nurseries and specialized medical personnel to provide critical care.

Last December, we opened the new 120-bed Southcoast Behavioral Health hospital on Faunce Corner Road. This new facility provides sorely needed access to care for patients with behavioral health and secondary addiction care. The 30 beds of the Rogers Unit were transferred from St. Luke’s to this hospital so that all our behavioral health patients can benefit from the robust programs offered in a joint venture with Acadia Healthcare, a leading provider of inpatient behavioral health services.

As we strive to integrate care, we now also have integrated patient information through Epic, our new electronic health record system that we implemented system-wide last fall. Each Southcoast patient now has a single, digital health record, accessible by every clinician at every point in our system. Patients also have access to their record through the MyChart patient portal.

Southcoast’s continuous advances have helped enhance our reputation. Our many recognitions include being ranked by Better Doctor, an independent consumer health website, as #1 in New England and 8th in the nation for heart attack care. Healthgrades also gave us 5 stars for cardiac care for five years in a row.

As important as 2015 was for Southcoast, I promise you that we will not stop evolving and improving. It is in our DNA. Since our founding, we have grown to become a nearly $1 billion economic engine with close to 7,500 employees. We are, by far, the largest employer in this region and the state’s largest employer headquartered south of Quincy.

Our goal was never simply to become bigger, but rather to grow strategically in order to deliver the best standard of care. As a not-for-profit healthcare system, we belong to you, our community, and we invest only in what we believe will benefit our patients’ optimal health. We, in turn, ask that you invest in us. Your philanthropic support has helped make Southcoast a national leader in healthcare by enabling us to continually advance the care we provide. I could not be more grateful for your generosity and your faith that Southcoast Health will continue to invest in your wellness for decades to come.

Keith A. Hovan
President & CEO
Southcoast Health System and Southcoast Hospitals Group
Peter Bullard thinks of his late mother Katherine every time he drives past St. Luke’s Hospital. She co-chaired the fundraising campaign that supported the $33 million expansion of the Emergency Department that was completed in 2007.

“I wonder if all that could have happened if she hadn’t been involved,” he said.

His mother died in 2005, before she could see the improvements completed. But Bullard carries on her legacy of support for community-based healthcare. A generous donor, he completed a 12-year term as a Southcoast Health trustee in December 2015.

“There is no more important charity in a community than its healthcare institution — because there is no more important issue than one’s health,” he said. “You have to step up and support it with time and financial resources.”

St. Luke’s has a special place in Bullard’s heart. The New Bedford lawyer was born there, as were his two daughters, his father, grandfather and likely his great-grandfather. A floor is named in honor of his father, Dr. John Crapo Bullard, who served in medical leadership at St. Luke’s until he retired in 1996. In 2001, Southcoast established the Bullard Society for supporters of the hospital who have made a provision in their estate plan to benefit St. Luke’s.

Bullard also appreciates the hospital’s integration into a comprehensive healthcare system. He believes his mother, who battled cancer, lived years beyond her prognosis, in part, because of the care she received at Southcoast. She could eliminate the stressful drives to a medical center in Boston, and “several Southcoast oncologists went beyond the call of duty to care for her,” he said.

That excellence is a credit to Southcoast’s executive team, he says. Because they have anticipated, rather than reacted to, the tumultuous changes in healthcare, Southcoast is in better operational and financial shape than many other health systems. That, in turn, has helped attract top physicians.

Bullard served as a trustee during a critical period in the system’s history. It was a challenge he relished. “I am a crusty old Yankee, which means I’m completely resistant to change,” he said. “But that’s not the environment that healthcare operates in today.”

He says he feels he learned more from being a trustee than he contributed, but he is proud of his involvement in hiring Keith Hovan as President and CEO in 2008.

“Given all the changes and challenges in healthcare today, success only happens when visionary leadership is combined with a keen focus on operational performance,” he said. “Keith is both a dynamic visionary and a terrific manager, and that is unusual.”

He says the region is blessed to have the three outstanding Southcoast hospitals, and Bullard is a man who counts his blessings: his family, “terrifically loyal friends” and a rewarding career. “I get to live in a beautiful part of the world with a 12-minute commute to work,” he said, “and have access to a top notch, local healthcare system.”

He encourages everyone to recognize Southcoast’s value in their lives. “It is incumbent upon all of us to make sure Southcoast is empowered to do what it needs to do,” he said. “You really have no choice.”
The Charlton family name has been synonymous with generosity for four generations, and today Stacey Charlton carries on a proud philanthropic tradition that has supported Southcoast Health’s mission for more than a century.

“The trustees of the Charlton Charitable Trusts believe that Charlton Memorial Hospital and Southcoast Health provide essential services to the area,” Stacey said.

“My family has strong ties to the hospital and the area, but it is the services and care provided to the South Coast community that really matter. The more I get to know Southcoast, the more I am impressed with its strategies for providing the best care possible.”

Stacey’s great grandfather, Earle P. Charlton, started the family’s philanthropic tradition with substantial donations to Truesdale Hospital, which in 1905 saved the life of his son and Stacey’s grandfather, Perry. The elder Charlton was a pioneering retailer who established E.P. Charlton Five & Ten Cent Company, in Fall River, and later went on to help create the F.W. Woolworth Company. He gave back to his community throughout his life and his wealth served as the basis for the Charlton Charitable Trusts.

Stacey’s father, Chuck Charlton, continued the family’s legacy of generosity as a trustee of the Charlton Charitable Trusts. He was born in Fall River, but grew up in Nevada and spent much of his life in California. The family connection to the South Coast region, however, remains strong. Stacey serves on the Steering Committee for the Campaign for Southcoast Health.

“My father spent a lot of time with his grandparents at their home in Westport,” Stacey said. “Most of his dearest friends were those whom he met there and stayed in touch with throughout his life.”

Those ties are evident when you visit Charlton Memorial Hospital, which was established with a $1 million gift from the Charlton Charitable Trusts. Earle P. Charlton’s portrait hangs in the main lobby near a 2007 portrait of Stacey and her father and mother, Frances, who are both now deceased. Tapestries that once adorned the home of Stacey’s great aunt, the late Ruth Charlton Mitchell, also a former trustee of the Trust, hang on a hospital wall near the surgery waiting room.

Under the leadership of Stacey’s father, the Charlton Charitable Trusts made substantial donations to Southcoast Health, including $2 million to help establish the Open Heart Surgery Program at Charlton Memorial. The Trusts also donated $2 million for the St. Luke’s Hospital Emergency Department; $1.2 million for the Ronald B. Goodspeed, MD, Endowed Chair in Patient Safety & Quality and $2 million to the Southcoast Centers for Cancer Care.

The depth of the Charlton family’s connections to the region was evident last September, when more than 200 people attended a Celebration of Life held in the memory of Chuck Charlton, who passed away in May 2015. The memorial was held at UMass Dartmouth, where the business school bears the family name.

Today, Stacey remains committed to the legacy of generosity begun by her great grandfather and the lessons of her father, who taught her to make a difference. While she is busy with her work as a meeting planner, she loves to take long walks with her German Shepherd and catch up with friends in the South Coast area.

She serves on Southcoast Health’s Campaign Steering Committee and through her involvement, Stacey continues her family’s commitment to ensuring the highest quality healthcare for the South Coast region.
For decades, the Weinberg family name has been associated with a legacy of community involvement and philanthropy that has passed from generation to generation.

“My mother and father both fervently believed that being involved in your community is a very important thing,” said Elizabeth (Betsy) Weinberg Smith. “You give your time, your treasure or your talent to your community. My mother’s commitment to Southcoast Health is a perfect example of that. She gave all three of those things.”

Tobey Hospital feels the lasting impact of that philosophy. Smith’s 93-year-old mother, Elizabeth (Betty) Houghton Weinberg, established the volunteer Patient Representative Program in 1993, helping to meet the needs and address the concerns of Tobey patients. Using her experiences from New York-Presbyterian Hospital, where she served as Director of Volunteers, and Memorial Sloan Kettering, Betty personally recruited and supervised Tobey volunteers to ensure that they offered assistance with compassion to every patient.

She was a Tobey Hospital Trustee and a member of the Southcoast Health System Development Committee and Capital Campaign Committee. In recognition of her dedication, she was awarded the Southcoast Trustees’ Medal for Outstanding Service in 2006.

Betty’s late husband, Jim, was a generous philanthropist who retired as senior director at Goldman Sachs, the investment bank that his father and later his brother both directed. He established the Sidney J. Weinberg, Jr. Foundation in honor of his father, which has supported the family’s passion for quality community healthcare with significant gifts over three decades. In 2011, the foundation donated $1 million to the Center for Cancer Care in Fairhaven, has been a loyal supporter of the Southcoast Annual Fund, and has supported many projects over the years at Tobey Hospital including the Emergency Department and the construction of a new surgical wing. The foundation has also supported the Southcoast VNA and its predecessor St. Luke’s Hospice Home Services.

“Tobey is a fine local hospital that has served our family and the whole community. My family’s contributions to Tobey reflect that appreciation.”

Smith said her family’s connection with this region started with her maternal great great-grandparents, James and Laura Dekay. Their daughter, Elizabeth Richardson, had a home on Main Street which is still in the family. In the 1930s, Smith’s grandparents, Laura and Amory Houghton, bought a home on Water Street. The tradition of family summers in Marion continues to this day: Smith’s own granddaughter and her daughter visit Marion, carrying the summer tradition into the seventh generation.

Smith’s parents, whose permanent homes had been in Rye, N.Y. and Greenwich, Conn., moved full-time to Marion about 20 years ago. The couple continued their community engagement with Jim’s involvements including the Trustees for Reservation, Buzzard’s Bay Coalition and the New Bedford Whaling Museum.

Smith and her siblings continue the distinguished family tradition of community service. She recently retired from the New York City Department of Parks and Recreation, where she worked closely with then Mayor Michael R. Bloomberg, and shared her father’s passion for open space. She serves on a variety of boards and committees.

“Our family has been in Marion a long time,” said Smith. “We have great affection for it and we believe in supporting our town. Our support of Tobey Hospital, and subsequently Southcoast, is an important part of that commitment.”
When Debra Desmarais, Robin Hodkinson and Harriet Desrochers were growing up together in Swansea, they knew their bond as sisters would always keep them together. But they had no idea that their chosen professions would also serve as a bond between them, their community and Southcoast Health.

Today, the three sisters have a combined 100 years of service to Southcoast. Their careers have advanced as the system has grown and evolved, and they are all happy to give back to the institution that they say has given much to them and their community.

“This is our community hospital, where our friends and family seek care first,” said Desrochers. “We want Southcoast to be able to offer the best care available.”

All three sisters began their careers at Union and Truesdale hospitals in Fall River. Desmarais led the way by joining the Radiologic Technology training program run jointly by Union Hospital and Northeastern University. She later trained her youngest sister, Hodkinson, in the same program. Desrochers was a student nurse at the hospitals.

Truesdale and Union merged to form Charlton Memorial Hospital in 1980, and then in 1996 Charlton joined with St. Luke’s and Tobey hospitals to form Southcoast Hospitals Group. The sisters sought more education, assisted by Southcoast, and their careers advanced. Desmarais and Hodkinson earned their Bachelor’s of Science in Health Services Administration from Providence College. Desmarais also holds an MBA from Bryant University and is Executive Director of the Southcoast Radiology Imaging Services Department. Desrochers, RN-C, BSN, works as the Epic Instructional Designer and is studying for her Master’s of Science in Nursing at UMass Dartmouth. Hodkinson became a lawyer at New England School of Law and works as a Senior Project Manager.

The family’s connections with Southcoast run deep. The sisters’ father, Harold J. Hodkinson, Jr. was a mechanical and fire protection engineer who inspected the hospitals. He and their mother, Geraldine, participated in focus groups as Southcoast planned the expansion of its cardiac and cancer care programs. Desmarais’ son and Desrochers’ daughter both worked at Charlton during college.

The community ties with Southcoast run just as deep, the sisters say. Desrochers remembers when, as a student nurse, she washed the hair of a patient who was in cervical traction. Two years later, that same patient overheard Desrochers’ mother talk about Harriet’s difficulties in finding lilacs for her wedding. Remembering Desrochers’ kindness as a student nurse, she invited her to pick all the lilacs she wanted from her yard.

“We filled the trunk twice with lilacs of all colors,” Desrochers said. “Southcoast is neighbors caring for neighbors.”

That makes Southcoast more than just a workplace. It is a place that deserves their philanthropic support, the sisters say.

“Our parents raised us to pay it forward,” said Hodkinson. “They always gave what they could.”

“If we don’t give to the place where we work, how can we ask anyone else to?” said Desmarais. “If I won the lottery, part of my winnings would go here.”
In 2016, Southcoast celebrates its 20th Anniversary as the region’s premier healthcare provider. Achieving this milestone would not be possible without the dedicated and tireless help of those who have supported us over the years. Celebrating our 20th Anniversary presents us with the opportunity to look back on what we have achieved and forward to where we hope to go as a health system.

Southcoast wouldn’t be the vibrant health system that it is today without the many individuals and families from our community — donors, volunteers, advocates and current and former board members — who have given so generously of their time, talent and treasure to ensure Southcoast’s continued success. For us, each member of our community represents an opportunity to make Southcoast Health better for everyone who calls the South Coast home.

Over the past year, we presented more than 300 individuals with a specially-designed Southcoast Health tie or scarf to acknowledge their role in making Southcoast the industry leader that it is today. We hope they will wear it proudly, as it represents our shared commitment to excellence and the high standard of care we deliver.

In celebration of Southcoast Health’s 20th Anniversary, we say thank you and extend our most profound gratitude to them — and to you — for your continued investment in Southcoast Health.
A sense of time

1996
Charlton Memorial, St. Luke’s and Tobey join together to form Southcoast Health.

1997
Makepeace Center for Women & Families opens at Tobey funded generously through The Community First campaign.

1997
The Jarabek Diagnostic & Treatment Center opens at Charlton.

2000
Supported by a $2 million donation from The Charlton Charitable Trusts, Southcoast Health becomes the 1st community hospital in MA to launch an open heart surgery program.

2002
Completed $32 million project at Charlton that included a new Surgery Center, Maternity Unit, Heart Center and Main Lobby.

2003
Tobey breaks ground on $12 million project funded through The Legacy Campaign that included state-of-the-art surgical suites and highly-sophisticated Intensive Care and Post-Anesthesia Care Units.

2004
St. Luke’s breaks ground on $33 million Emergency Department renovation and expansion as part of The Campaign for a New St. Luke’s.
The Ronald B. Goodspeed, MD Endowed Chair in Patient Safety & Quality is established at Southcoast, funded entirely through donations.

2005

Southcoast celebrates its 10th anniversary, bringing together the collective experience of more than 311 years of continuous service to our community.

2006

A new Mobile Health Van was unveiled to provide better access to health screenings, education, and blood donation, made possible through support from Southcoast Health’s President’s Council.

2011

The Ronald B. Goodspeed, MD Endowed Chair in Patient Safety & Quality is established at Southcoast, funded entirely through donations.

2015

Southcoast celebrates its 20th anniversary, building on the foundation of excellence of its three legacy hospitals.

2016

Southcoast celebrates completion of $13.5 million renovation to the Stoico/FIRSTFED Maternity Center at St. Luke’s Hospital as part of The Campaign for Southcoast Health.

2014

The Centers for Cancer Care Campaign raises $15.5 million, including a single donation of $5 million, to open a new Center in Fairhaven and support renovations at Charlton.

2011

Southcoast unveils the Harold and Virginia Lash Heart and Vascular Center at Charlton funded by The Campaign for Southcoast Health.
Ways to Make a Planned Gift to Southcoast Health:

When you choose to make a planned gift to Southcoast Health you are leaving behind a legacy that will significantly benefit generations to come, while providing financial flexibility and tax benefits to you and your family today. There are numerous types of planned gifts that can help you to meet each individual and family’s financial and philanthropic objectives. Some of the most popular options are:

Charitable Gift Annuities — are among the oldest, simplest and most popular of the charitable life-income plans. In exchange for a transfer of cash or marketable securities, donors and/or a beneficiaries receive annuity payments for life.

Charitable Remainder Trusts — are growing in popularity largely due to their financial and estate-planning flexibility. With a CRT, assets are placed into the trust, which provides income to the pre-determined beneficiary or beneficiaries. At the end of the term of trust, “the remainder” distributes to Southcoast Health.

Bequests — both large and small — have played a significant role in making Southcoast Health the industry leader it is today. Donors simply name Southcoast as the beneficiary of a portion or a specified amount of their estate.

Gifts of Retirement Plan Assets and Life Insurance — naming Southcoast Health as the beneficiary of your retirement plan or life insurance policy is an easy way to support Southcoast’s future. Simply fill out a form that is entirely separate from your will, which means you do not need an estate planning attorney to make this gift, and review and adjust beneficiary designations anytime you want.

Anyone who has the vision and inclination to provide for our region’s long-term healthcare needs can make a real difference through planned giving. We invite you to consider your philanthropic goals and how they can ensure the health and well-being of generations of South Coast residents to come.

If you have any questions about planned giving or have already included Southcoast Health in your estate plan, please contact Sarah Gonet, Major Gifts and Planned Giving Officer at 508-973-5950 or by email gonets@southcoast.org.
Endowment Funds

Endowment Funds and Perpetual Trusts established for the benefit of Southcoast Health and/or its legacy hospitals.

Arthur W. Allen Fund
Auxiliary of Charlton Memorial Hospital Endowment Fund
Leonard & Mary Birtwistle Memorial Fund
John and Arline Booth and Frank and Norma DuVally Memorial Fund
Charlton Charitable Trusts
- Ruth Charlton Mitchell Masson Fund
- E. P. Charlton Fund
- Earle P. Charlton Trust (for Truesdale Hospital)
- Earle P. Charlton Trust/Ida S. Charlton Fund (for Union Hospital)
William Clayton, Jr. Trust
Edith H. DeMauro Charitable Trust
Louis F. Fayan Smoking Prevention Endowment Fund
Emma P. Fayan Trust
Ethel M. Gainey Charitable Trust
John T. Galligan Perpetual Trust
The Ronald B. Goodspeed, MD Endowed Chair in Patient Safety & Quality
The Allen Jarabek Oncology Fund

Medical Staff Endowment Fund
Mary E. “May” Quirk Living Trust
Gladys Reynolds Savoie Trust
Frank and Elizabeth R. Stevens Fund
Susanna K. Tobey Trust
Tobey Hospital Endowment Fund
Frederick & Charlotte Webb Trust

Southcoast Health Planned Giving Societies

To recognize friends who have made a provision for the hospital(s) in their estate plans or through the establishment of a life-income or other planned gift. By notifying us of your intention to give a future gift, we are able to thank you during your lifetime for taking this important step.

Alice Tobey Jones Society
Named in honor of Alice Tobey Jones whose generous bequest in 1922 established Tobey Hospital.
- Catherine A. and John D. Bergeron
- Mr. and Mrs. Edward C. Brainard, Ill
- Priscilla B. and Allan W. Ditchfield
- Natalie H. Fearing
- Mary M. and Horace S. Kenney
- Faith A. and Charles G. Paulsen
- Jane Ryder
- Harvey and Judy White

Bullard Legacy Society
Named to honor the Bullard and Crapo families for their lasting legacy as doctors, hospital presidents and philanthropists.
- Frank Calabresi
- Mary B. and Peter G. Huidekoper
- Elizabeth I. and J. Greer McBratney, MD
- Richard H. Warburton, MD

Elizabeth and Frank Stevens Society
Named to honor Elizabeth and Frank Stevens who were among the first people to provide financial resources to improve healthcare services in the Fall River area.
- Anne V. Fayan
- Elizabeth L. Marsden
- Ann T. Petrella
- James P. Sweeney
- Sylvia B. Tompkins

Southcoast Planned Giving Society
- Joyce A. and Joseph A. Ciffolillo
- Gary A. Grosart, MD

If you would like more information about planned giving, or if you have made provisions in your estate plans for Southcoast Health and would like to be listed as a member of our planned giving societies, please contact:

Sarah Gonet
Major Gifts and Planned Giving Officer
Southcoast Health
101 Page Street
New Bedford, MA 02740
Tel. 508-973-5950
email gonets@southcoast.org
Throughout the history of Southcoast Health and its legacy hospitals, volunteers have played a key role in supporting both the hospitals’ mission and the patients they serve.

Members of the Charlton Memorial and St. Luke’s hospitals Auxiliaries and the Tobey Guild have long given generously of their time, treasure and talent to help ensure the community has access to the best possible care and services right here on the South Coast. They have supported every capital campaign and funded specific needs that have helped to enhance patient care and visitor comfort, raising millions of dollars over the years.

Officers and members spend countless and tireless hours planning and carrying out a wide variety of events and activities. Galas, bus trips, raffles and merchandise sales are just a few items in their fund raising tool kits, but their generosity extends beyond raising money. They also run each hospital’s gift shop with proceeds dedicated to their fundraising initiatives.

Understanding that patient care also requires a personal touch and emotional connection, the Auxiliaries and Guild purchase poinsettias for patients at Christmas and deliver Valentine cards in February to help brighten inpatients’ days.

With an eye toward future generations of caregivers, the Auxiliaries and Guild award annual scholarships to students pursuing higher education that will lead to careers in healthcare. Members also act as ambassadors for the hospitals, educating the community on the top-notch services available at Southcoast hospitals and the importance of supporting their community health system. The breadth of their support is unparalleled and invaluable to Southcoast's success.

Thank you to all our dedicated volunteers.

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Auxiliary and Guild Presidents

**The Auxiliary of Charlton Memorial Hospital**
- **1996-1997**: Ann Petrella
- **1998-2001**: Carol O’Connell, Louise McCarthy
- **2001-2003**: Mrs. Marilyn Roderick
- **2003-2004**: Mr. Frederick McDonald
- **2004-2006**: Ms. Gail Berman Martin
- **2006-2008**: Mrs. Beth Ann Higgins
- **2008-2012**: Mrs. Frederick McDonald
- **2012-2015**: Mrs. Louise McCarthy
- **2015-Present**: Ms. Paula Raposa

**St. Luke’s Hospital Auxiliary**
- **1996-1998**: Mrs. Joan Bickman
- **1998-2001**: Mrs. Marilyn Roderick
- **2001-2003**: Mr. Frederick McDonald
- **2003-2004**: Ms. Gail Berman Martin
- **2004-2006**: Mrs. Barbara Warburton* & Mrs. Louise Mitchell
- **2006-2009**: Mrs. Trudy McCormack & Mrs. Stephanie Erickson
- **2009-2012**: Mrs. Muriel Morse & Mrs. Patricia Gardner
- **2012-2013**: Mrs. Lily Fagundes & Mrs. Ana Rod-Fogarty
- **2013-2014**: Mrs. Cecelia Russell
- **2014-2015**: Mrs. Norma Warburton
- **2015-Present**: Mr. Gary Simmons

**Tobey Hospital Guild**
- **1996-1998**: Mrs. Evelyn Pursley*
- **1998-2000**: Mrs. Martha Herring*
- **2000-2003**: Mrs. Ellen Warr*
- **2003-2005**: Mrs. Jean MacDonald
- **2005-2007**: Ms. Nancy Tuck
- **2007-2010**: Mrs. Josephine Praino
- **2010-2013**: Mrs. Ronna Santoro*
- **2013-2015**: Mrs. Bonnie Murphy
- **2015-Present**: Ms. Elaine Meredith

*Deceased

**St. Luke’s Hospital Auxiliary**
- **2015**: Norma Warburton
- **2016**: Gary Simmons

**Tobey Hospital Guild**
- **2005-2015**: Josephine Praino, Dorothy Rasmussen, Joan Martin, Elaine Meredith

**The Auxiliary of Charlton Memorial Hospital**
- **1996-1997**: Ann Petrella, Carol O’Connell
- **1998-2001**: Louise McCarthy, M. Paula Raposa

*Deceased
In the summer of 1996, a new vision for community healthcare was born when Charlton Memorial, St. Luke’s and Tobey hospitals merged to form Southcoast Hospitals Group. The community rallied to that vision with generosity and support, and the celebration of Southcoast’s 20th anniversary is also the celebration of a community’s determination to forge a new standard of healthcare for their families and neighbors. Because of that support, the region is now home to a robust healthcare system that responds to the unique needs of our communities, providing the very best in cardiac, cancer, maternity, orthopedics and numerous other areas of care — and delivering it close to home.

Stacey Charlton is among the people inspired by that mission. As you have read in this Annual Report, she continues the legacy of generosity started by her great grandfather, Earle Perry Charlton. He gave the family’s first gift to Truesdale Hospital — one of Charlton Memorial’s predecessors — after a surgeon there saved his son’s life in 1905.

Stacey’s father, Earle P. “Chuck” Charlton II, carried on the tradition with gifts from the Charlton Charitable Trusts that included $2 million to help establish the Open Heart Surgery Program at Charlton Memorial and $2 million to the Southcoast Centers for Cancer Care.

Chuck Charlton passed away in May 2015, but not before he passed his spirit of philanthropy on to Stacey.

In a similar way, Elizabeth (Betsy) Weinberg Smith continues her parents’ commitment to giving back. Her mother, Marion resident Elizabeth “Betty” H. Weinberg, established the volunteer Patient Representative Program at Tobey Hospital, using her experiences at the New York-Presbyterian Hospital. And the Sidney J. Weinberg, Jr. Foundation, established by Smith’s late father, is a loyal supporter of Southcoast Health, including $1 million gift to the Center for Cancer Care in Fairhaven.

In New Bedford, Peter Bullard, an attorney and former Southcoast trustee, has a lifelong connection with St. Luke’s Hospital, where he, his children, his father and grandfather were born. His late father, Dr. John Crapo Bullard, has a floor named for him in recognition of his medical leadership until he retired in 1996. Peter’s late mother, Katharine, was an active supporter of the hospital.

“The is incumbent upon all of us to make sure Southcoast is empowered to do what we need it to do,” he said. “You really have no choice.”

Debra Desmarais, Robin Hodkinson and Harriet Desrochers, three sisters who are career-long employees of Southcoast, would agree. Desmarais is Executive Director of Radiology Imaging Services. Desrochers began her career as an RN and is now an Epic Instructional Designer. Hodkinson is a lawyer who works as a Senior Project Manager.

Together, they have a combined 100 years of service to Southcoast Health, and they are happy to give back because they want the best available care when their loved ones need it.

“This is our community hospital, where our friends and family seek care first,” said Desrochers. These stories illustrate how the history of Southcoast is embedded in our communities and is evolving as our communities evolve. Today, Southcoast Health looks ahead to new advances in care and we continue to count on community support.

Less than two years ago, we announced the launch of The Campaign for Southcoast Health to support the Harold and Virginia Lash Heart and Vascular Center, the Stoico/FIRSTFED Maternity Center at St. Luke’s and a renovation and expansion of the Emergency Department at Tobey Hospital. Already, we are well over half way to our $25 million goal. Members of the Southcoast Board of Trustees, the President’s Council and Southcoast’s senior administrators set an example of generosity by each taking leadership positions in the campaign. The Campaign Steering Committee is reflective of that leadership and I thank each
member for taking part: co-chairs Jean MacCormack and Nick Christ and committee members Keith Hovan, Lou Cabral, Jason Rua, Dr. Gil Shapiro, Maureen Sylvia Armstrong, Dr. David McGinnis, Stacey Charlton and George Mock.

This custom of support and generosity helped create a community-based healthcare system that delivers world class care. It is a remarkable achievement that should make the entire South Coast community proud.

As we celebrate Southcoast’s 20th anniversary, we look to the future with confidence and thank you for the pivotal role you continue to play in enabling us to fulfill our mission.

Jack Dresser
Senior Vice President & Chief Philanthropy Officer
A sense of investment

Southcoast received $6.4 million in calendar year 2015 from 1,354 donors. Thank you!

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- Patients & Community Members: 63%
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- Campaign for Southcoast Health: 71.42%
- General Patient Care: 10.67%
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2015 Tobey Guild Gala
Robin Arruda and John Rooke

2015 Tobey Guild Gala
From left: Cheri Ikasalo,
Anne Rutschmann, Mary Missert
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Rhode Island Department of Health
Massachusetts Department of Mental Health
Accredited by
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American College of Radiology
American College of Surgeons
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Diabetes Self-Management Education
College of American Pathologists
Intersocietal Accreditation Commission
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Medicaid Services
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Rhode Island College
Curry College
Regis College
Simmons College
University of Massachusetts Dartmouth
Women & Infants Hospital

*Denotes Deceased
Financials:
Net Assets & Operating Trends

Net Assets

2011 2012 2013 2014 2015

UNRESTRICTED  TEMPORARILY RESTRICTED  PERMANENTLY RESTRICTED

( in millions)

$0 $200 $400 $600 $800

$545 $622 $667 $673 $678
### Operating Revenue

<table>
<thead>
<tr>
<th>Year</th>
<th>Inpatient</th>
<th>Outpatient</th>
<th>Other</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>$736</td>
<td></td>
<td></td>
<td>$30</td>
</tr>
<tr>
<td>2012</td>
<td>$781</td>
<td></td>
<td></td>
<td>$20</td>
</tr>
<tr>
<td>2013</td>
<td>$833</td>
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<td></td>
<td>$10</td>
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<tr>
<td>2014</td>
<td>$885</td>
<td></td>
<td></td>
<td>$0</td>
</tr>
<tr>
<td>2015</td>
<td>$986</td>
<td></td>
<td></td>
<td>$0</td>
</tr>
</tbody>
</table>

**Annual average growth rate = 8%, FY2015 shows 11% increase over prior year**

### Operating Profit (Loss)

<table>
<thead>
<tr>
<th>Year</th>
<th>Profit (Loss)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>$8</td>
</tr>
<tr>
<td>2012</td>
<td>$16</td>
</tr>
<tr>
<td>2013</td>
<td>($8)</td>
</tr>
<tr>
<td>2014</td>
<td>($30)</td>
</tr>
<tr>
<td>2015</td>
<td>$5</td>
</tr>
</tbody>
</table>
Financials:

Community Investment

**Employment**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>$548</td>
<td>$584</td>
<td>$623</td>
</tr>
</tbody>
</table>

- **14% growth over past two years**
- **7% in FY2015**

**Personal Services**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>$63</td>
<td>$78</td>
<td>$96</td>
</tr>
</tbody>
</table>

- **5% growth over past two years**
- **2% in FY2015**

**Technology**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>$13</td>
<td>$47</td>
<td>$50</td>
</tr>
</tbody>
</table>

- **$110 over past three years**

**Buildings and Equipment**

<table>
<thead>
<tr>
<th>Year</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value</td>
<td>$34</td>
<td>$43</td>
<td>$64</td>
</tr>
</tbody>
</table>

- **$141 over past three years**
In addition, feel free to reach out to any of our staff members listed below:

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