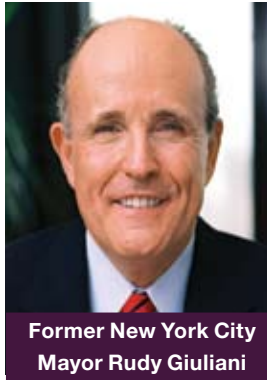


## Rudy Giuliani to headline EveryMan™

**F**ORMER NEW YORK CITY MAYOR and presidential candidate **Rudy Giuliani** will be the guest speaker as Baylor Health Care System Foundation hosts the second annual **EveryMan™** dinner on May 13 at the Ritz-Carlton in Dallas.



Former New York City Mayor Rudy Giuliani

Giuliani's father died of prostate cancer in 1981, and Giuliani was diagnosed and successfully treated for the disease in 2000.

EveryMan™ raises money to support prostate cancer research, community outreach, expanded technology and patient care throughout Baylor Health Care System.

The event's honorary chairman will be **Thomas O. Hicks**, chairman and chief executive officer of Hicks Holdings LLC.

For more information about EveryMan™, contact Marcus Baker at 214.820.2681 or Marcus.Baker@BaylorHealth.edu.

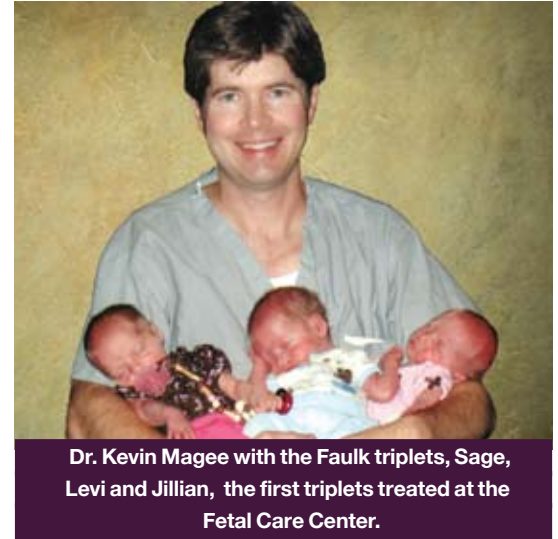
## Crystal Charity Ball to raise \$750,000 in support of Fetal Care Center

**T**HE CRYSTAL CHARITY BALL will raise money this year to help children who haven't yet been born. The organization, which supports Dallas County children's charities, has committed to raise \$750,000 for the Fetal Care Center at Baylor University Medical Center at Dallas. The funds will help the fetal care center become the entry point for comprehensive obstetrical care for high-risk pregnancies.

The center plans to enhance its facility to accommodate complicated cases, acquire endoscopy and laser equipment for in-utero surgeries, and provide training for additional physicians and nurses. It also seeks to improve care coordination, patient education and professional counseling. Expanded clinical research will allow Baylor Dallas to offer advanced treatments, and an improved Web portal will offer better access for referring obstetricians and/or mothers.

By doing so, the Fetal Care Center at Baylor Dallas will become one of fewer than 10 centers in the U.S. that provide a full spectrum of fetal interventions and surgeries.

"We are ready to enter the future of fetal



Dr. Kevin Magee with the Faulk triplets, Sage, Levi and Jillian, the first triplets treated at the Fetal Care Center.

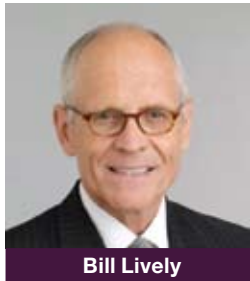
medicine – to perform advanced fetal surgeries here at Baylor so that mothers don't have to travel to get the vital care their babies need," said **Kevin Magee, M.D.** "We are grateful to The Crystal Charity Ball for helping make this possible."

Approximately 300 cases are referred to the Fetal Care Center each year.

For more information about supporting the Fetal Care Center, contact Roxann Garcia at 214.820.8196 or Roxann.Garcia@BaylorHealth.edu.

## Lively teams up with Foundation as strategic development consultant

**B**AYLOR HEALTH CARE SYSTEM FOUNDATION has added a veteran fundraiser to its team, appointing **Bill Lively** as its senior strategic development consultant. Bill will offer counsel in the development and implementation of a long-term philanthropic plan for Baylor Health Care System. Initially, he will offer advice on fundraising efforts for the new \$350 million cancer center at Baylor University Medical Center at Dallas.



Bill Lively

"Bill will provide objective, expert advice based on his experience with successful philanthropic activities and campaigns," said Foundation president Rowland K. Robinson. "He will

leverage his expertise and contacts to assist Baylor in our goal of becoming one of the nation's pre-eminent health care organizations. We are honored to have him as part of our team."

From 2000 through 2008, Bill served as founding president and chief executive officer of the Dallas Center for the Performing Arts Foundation. Under his leadership, the campaign to build the center generated more than \$334 million, including 129 gifts of \$1 million or more.

At the beginning of 2009, Bill became president and CEO of the North Texas Super Bowl XLV Host Committee. He also serves as president of the endowment trust for the Dallas Center for the Performing Arts Foundation.

"Bill's experience during the campaign to build the Dallas Center for the Performing Arts and his quarter of a century of service to Southern Methodist University make him uniquely

qualified to advise Baylor Health Care System Foundation as it develops its most ambitious and important philanthropic initiative to date," said Joel Allison, president and chief executive officer of Baylor Health Care System.

Bill said he chose Baylor as his next project because of his profound appreciation of the impact Baylor will have on the delivery of high-quality health care services.

"Strategic, high-dollar fundraising is the product of a noble organization guided by a long-term strategic plan, managed by competent staff and supported by a legion of dedicated volunteers. Baylor has all of these things in place as it begins the next generation of its important service to Dallas and the region," Bill said.

For more information about supporting the Foundation's initiatives, call 214.820.3136 or e-mail thetorch@BaylorHealth.edu.

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## Pensons' \$500,000 gift honors physicians

**W**HEN JOHN G. "JACK" AND NANCY PENSON made a \$500,000 gift to the new cancer center at Baylor University Medical Center at Dallas, they found a way not only to help those fighting cancer but also to honor a pair of physicians who are close to them.

The gift was made in December in honor of Nancy's uncle, **William Lee Hudson, M.D.**, a surgeon who practiced at Baylor Dallas in the late 1930s, and **John Brooks, M.D.**, their current internist.

"We wanted to give something back that would recognize the efforts of these fine physicians and their work at Baylor over the years, and we couldn't think of a better way than this," Jack said.

The new cancer center is a \$350 million project featuring a 450,000-square-foot outpatient building to be completed in early 2011. Additionally, Collins Hospital will be renovated into an inpatient cancer hospital with 120 rooms, and Sammons Tower will become the hub for medical oncology education and research



Dr. William Lee Hudson



Dr. John Brooks

by January 2013.

"Our vision is for cancer patients to have access to advanced prevention, screening, diagnosis and treatment close to their homes," said Baylor Health Care System Foundation president Rowland K. Robinson. "Such a big plan could not become a reality without gracious donors like the Pensons."

For more information about the new cancer center, please contact Drew Oleson at 214.820.4721 or [Drew.Oleson@BaylorHealth.edu](mailto:Drew.Oleson@BaylorHealth.edu).

## Foundation staff gives back at homeless center

**M**EMBERS of the Baylor Health Care System Foundation staff served lunch January 12 to more than 600 at The Bridge, Metro Dallas Homeless Alliance's downtown homeless assistance center.

"It was a rewarding experience to help those who are most in need," said Foundation vice president Clare Graca. "It was very humbling to provide something so basic and see how much it was appreciated."



### FOUNDATION 30TH ANNIVERSARY

## Boone Powell Sr. was prepared for every challenge

**"T**HE FUTURE BELONGS TO those who prepare for it," **Boone Powell Sr.** was fond of saying. Boone worked tirelessly to ensure that Baylor University Medical Center at Dallas was ready for everything that came its way.

In 1975, after 27 years as the chief administrator of Baylor Dallas, Boone stepped down to concentrate on fundraising for additional growth. Three years later, he used a \$5 million endowment to create the Baylor University Medical Center Foundation.

Throughout his career, Boone raised money to help Baylor reach its goals, bringing in more than \$200 million from private benefactors during his time as a hospital administrator. But that's not what he would want to be remembered for.

"I don't know anything about fundraising," he once said. "I'm a builder, and if it takes money to build what Baylor needs, I'll get it."

Boone established the Foundation to provide a "medium for involvement of outstanding community leaders in the work of the medical center, widely promoting quality patient care and research, as well as new and innovative educational and training programs," according to its original articles of incorporation.

His long tenure as executive head of Baylor Dallas and the respect with which he was regarded in North Texas made Boone effective in the



Gordon Caswell, Sid Levit, Boone Powell Sr., Buddy Minyard and Boone Powell Jr. in 1985

Foundation's early efforts to develop financial support. He established the Foundation as a credible entity in ways that no one else could have.

"He reached out to all people," said **Lindalyn Adams**, an original board member who still works for the Foundation. "He was friends with the presidents of all the major banks. He knew the community, he knew who the leaders were, and he recruited them to come help at Baylor."

"He was a people person, and everyone thought the world of him. You always thought you were one of his greatest

friends. He was so effective because he was so disarming."

He also made it hard for people to say no when Baylor came calling, said **Perry Gross, M.D.**, who was also on the original Foundation board.

"He would always say, 'This is an opportunity you don't want to miss.'"

Once he had won them over, Boone arranged for Foundation board members to hear presentations from doctors on the latest technology and programs, a practice that continues today.

"His greatest realization was that he needed to keep raising funds," Lindalyn said. "He led the way."

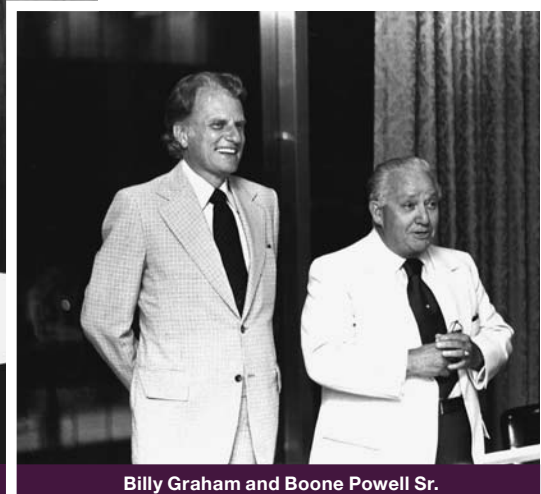
The Foundation has distributed more than \$300 million to Baylor Health Care System since 1978.

Boone retired as president of the Foundation in 1983, but he continued to serve as a senior consultant until he passed away in 1996.

*This is the third article in a series focusing on the contributions of the individuals who have built a legacy through Baylor Health Care System Foundation and those who are carrying on the philanthropic tradition.*



David Hitt and Boone Powell Sr.



Billy Graham and Boone Powell Sr.



## Plans continue for \$213 million medical center in McKinney

**B**AYLOR HEALTH CARE SYSTEM continues to develop plans for the \$213 million Baylor Medical Center at McKinney.

The facility will include a 95-bed, four-story hospital and a medical office complex. It is expected to be completed by November 2010 on 58 acres at the northwest corner of Highway 380 and Lake Forest Drive. Physician practices will be located in the adjacent medical office building.

Stan Tatum will lead the fundraising effort and serve as development manager for the new facility.



Baylor Medical Center at McKinney

RTKL Architects, CB Richard Ellis and MEDCO Construction are developing the hospital and property.

For information about supporting the new McKinney hospital, contact Stan Tatum at 469.742.9782 or StanT@BaylorHealth.edu.

### BAYLOR HEALTH CARE SYSTEM BAYLOR MEDICAL CENTER AT MCKINNEY

Baylor Medical Center at McKinney will provide:

- Obstetrics and gynecology
- General surgery
- Cardiovascular care, including cardiac catheterization
- Gastroenterology, including endoscopy services
- Orthopedics
- Neurology and neurosurgery
- Internal medicine
- Full-service emergency department
- Extensive outpatient services

## PHYSICIAN PROFILE

RON JONES, M.D.

**R**ON JONES, M.D., has been the chief of surgery for Baylor University Medical Center at Dallas since 1987 and is director of the general surgery residency program. He came to Dallas in 1960 for a surgery residency at Parkland and has been in Dallas ever since. He grew up in Harrison, Arkansas, and has three grown children, **Cynthia Jane Lambert, Douglas Jones** and **Mary Snow**.



Dr. Ron Jones

**What do you like most about Baylor? Why would you recommend it to a friend?**

I would recommend it because of the quality of the facility and the physicians, and you feel it's a safe place for people to come. No matter what happens, you're pretty much assured that there's somebody who will take care of it.

**What is a special story that you have about an experience with Baylor?**

My wife, **Jane**, had a stem cell transplant for lymphoma leukemia. I had a special experience

with the bone marrow unit. She had two more years of a very good life. She had aortic stenosis and was scheduled to have a second aortic valve replacement when she suddenly died. But we were able to celebrate our 52nd wedding anniversary.

**What Foundation project are you passionate about? How are you involved in it?**

I'm interested in graduate medical education. There are eight endowed lectureships in the department of surgery. Nationally known surgeons annually give these lectures.

**Tell us about your educational and professional background.**

I graduated from medical school at the University of Tennessee at Memphis. My general practice residency was at the University of Oklahoma, with subspecialties in internal medicine and surgery. After a three-year general practice program, I decided I liked surgery, so I came to Parkland for a general surgery residency and stayed at UT Southwestern Medical School for 23 years and was acting chief of surgery from 1974–76. I've been at Baylor for 22 years as chief of surgery.

**What are your hobbies or interests?**

I collect antique French clocks.

**Most would be surprised to know that ...**

I raise cattle and have a farm in Arkansas. ...

I took ballroom dancing lessons for 15 years until 2007. ... And I was the medical director who, in conjunction with the fire department, established ambulance service in Dallas in 1970.

### Jones treated JFK, Oswald

**O**n Nov. 22, 1963, Dr. Jones, a young chief surgery resident at Parkland Memorial Hospital, was having lunch when he heard several pages over the loudspeaker for department chairmen. On learning that President John F. Kennedy had been shot, he quickly made his way to the emergency room.

Once there, he helped perform a tracheotomy, inserted an IV and intubated the president's chest. But within 10 minutes, it was clear Kennedy could not be resuscitated.

"I remembered a lecture in medical school by one of the professors, who said, 'Be sure of your diagnoses and treatment because someday you may be treating the president of the bank,' Dr. Jones said. "I grew up in Harrison, Arkansas, and by some astronomical odds found myself treating the president of the United States."

Two days later, Dr. Jones was called to the emergency room to treat another patient with a gunshot wound, and he performed some of the same procedures on Lee Harvey Oswald.

## FOCUS ON RESEARCH

### Baylor researchers reveal the healing power of certain foods

**R**ESearchers at Baylor Research Institute (BRI) are looking into whether the foods you eat might just contribute to a healthier you.

One study set out to explore the connection between the Mediterranean diet and a lower incidence of cancer and heart disease. Researchers focused on extra-virgin olive oil and discovered that compounds in it can help fight damaged cells that can develop into cancer.

"The olive oil was toxic to tumor cells using the gene that serves as the body's alarm system and prevents replication of damaged cells," said **Rick Boland, M.D.**, a BRI investigator and gastroenterologist at Baylor University Medical Center at Dallas. "The olive oil activated this alarm system and heightened the

sensitivity of the cells to anything that might damage its DNA."

In another study, Baylor researchers reviewed literature on curcumin, a principal component of curry powder. According to BRI investigator **Ajay Goel, Ph.D.**, every study has demonstrated curcumin's power as an anti-cancer compound.

"In India, it's common to treat cuts, bruises and swelling with a paste made with curry powder, so we know it has anti-inflammatory and antibacterial properties," Dr. Goel said.



Dr. Rick Boland

"Research has demonstrated that curry powder can inhibit tumor growth without affecting healthy cells."

Dr. Goel and his colleagues are looking into how curcumin might bring relief to people with inflammatory bowel disease.

Drs. Boland and Goel have also demonstrated that Annurca apples, green tea, grapes and berries have disease-fighting properties.

"By identifying the beneficial compounds in various foods, you could create a rationally designed dietary plan that would be optimally preventive," Dr. Boland said. "You use a little bit of olive oil to sauté things, a little bit of curry and have a glass of wine," Dr. Goel said. "I don't think anybody's going to complain about eating that kind of diet."

## Why I Give ... Philanthropy is a way of life for Wayne family

**D**URING A WEAK ECONOMY, both investors and philanthropists search for key indicators of a positive long-term investment: a strong core and a high return on investment.

Entrepreneur **Herman Lay**, co-founder of Frito-Lay and PepsiCo, defined the type of strong core that defines long-term success in both business and philanthropy:

"You look for management people and a business that's growing, esprit de corps and integrity. Baylor has all these elements. As a competitive person, I like working with a winner."

Herman, the first chairman of the board of Baylor Health Care System Foundation, is not the only one who has found value in Baylor.

The Wayne family, headed by **Ernestine "Ernie" and the late Bradley Wayne**, has been a generous supporter of initiatives at Baylor University Medical Center at Dallas since the 1980s. They have passed that love of giving on to their children, **Sue Wayne Strauss, Marcy Grace and Jon Wayne**.

"Money is the last thing we think about," Ernie said. "It's the need."

Ernie said helping others was something she grew up with.

"My mother was very much interested in taking care of the next person. Things were bad in the '30s, but my parents found ways to help people," she said. "That was our way of living. We expected to do it."

Ernie and Brad continued to support philanthropic causes, but health crises changed how they approached their philanthropy. After Ernie had bypass surgery, the Waynes established the Caring Hearts® program, which brought in former heart patients to support, comfort and guide those receiving cardiovascular care.

"You can put your name on a room, but it doesn't do anything for them," Ernie said. "Our volunteers help patients when they are in their moment of greatest need. If you can't get passionate about that, you have no passion."

Sue said philanthropy has become something



Ernestine "Ernie" Wayne, Cynthia Krause, Sue Wayne Strauss and Jon Wayne

that connects the Waynes across generations.

"My parents were always very philanthropic, but very quietly so," Sue said. "It wasn't really something they talked about. It was not until the bypass surgery that it all came out into the open and became a family discussion. It became the central focus of their lives. We talked about it and made family decisions.

It's made an impact on my life and on my relationship with my children."

People can put the skills they use when building their businesses into effect when looking for ways to support worthy causes, Jon said.

"It's another opportunity to be creative," Jon said. "The same ingenuity that built the business can also build amazing programs."

Ernie said finding what she cared about at Baylor has created a sense of purpose.

"It's life's payback," she said. "We were put here for a reason."

## The Foundation's top donors

**B**AYLOR HEALTH CARE SYSTEM FOUNDATION, a separately incorporated not-for-profit organization, raises and manages charitable funds for Baylor Health Care System. Since its inception in 1978, the Foundation has distributed more than \$300 million to Baylor Health Care System. It has a donor base of close to 8,000 individuals, corporations and foundations. We would like to thank the generous donors who have supported our mission over the years. Here is a list of those who gave \$2,500 or more in calendar year 2008:

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The Marilyn & Sonny Oates Foundation



## Donors Make a Difference

**A**S DONORS TO BAYLOR HEALTH CARE SYSTEM FOUNDATION, you make a difference in the lives of individuals. Below is a list that we hope will serve as a reminder of the profound impact that your contributions make on lives in our community.

### TODAY, AS A BAYLOR DONOR, I ...

- Trained a new doctor who will go on to provide care for the underserved communities in our region.
- Diagnosed a woman in the very early stages of breast cancer, thanks to our new digital imager.
- Helped a three-year-old learn to eat in our nationally recognized feeding program at Our Children's House at Baylor.
- Saved the life of an automobile accident victim in our new emergency department.
- Provided laptops and a few moments of diversion to bone marrow transplant patients and their families.
- Discovered a cancer vaccine to fight melanoma.
- Performed an islet cell transplant so that a 19-year-old diabetic may live insulin-free.
- Helped a 15-year-old high school student learn to walk again after a traumatic brain injury.
- Safely delivered life-saving drugs to a premature infant in the neonatal intensive care unit.
- Screened a newborn for more than 25 metabolic diseases.
- Visited a senior citizen in his home to provide spiritual companionship.
- Gave an expectant grandfather a new kidney so that he could see the birth of his first grandson.



*From the President*

## CHANGE

### Welcome to 2009.

It is about a new president.  
It is about unimaginable events.  
It is about how safe your assets are.  
It is about sustaining the financial system.  
It is about tough news.  
It is about everyone and every enterprise.  
It is both stirring and historic.

### At Baylor Health Care System Foundation,

We know that positive outcomes seldom come from a focus on fear.

We confess to being concerned.

We acknowledge that stress comes with economic upheaval.

We are determined to stay focused, consistent, faithful and confident.

We turn to others for support and open communication.

We aspire to be innovative and creative.

We are alert to serving others who are going through tough times.

We are all about good stewardship.

We try to grow in our faith.

### During difficult times, certain timeless themes, patterns and leadership components ring true:

The power of clearly defined and clearly communicated statements of our vision, mission, values and goals

The principle of doing the right thing – especially under adverse conditions

The importance of teamwork

The value of persistence – never giving up on the dream, the mission or your mates

### Baylor Health Care System is about more than 100 years of stewardship and taking care of people.

We are honored to serve you.

We are thankful for your trust and confidence.

We are hopeful that your year will be filled with new opportunities.

### Two closing thoughts:

*"The future belongs to those who prepare for it."*  
– Boone Powell Sr.

*"The historians have proven the optimists were right."*  
– Trammell Crow

Rowland K. Robinson  
President

Baylor Health Care System Foundation  
Robinson@BaylorHealth.edu

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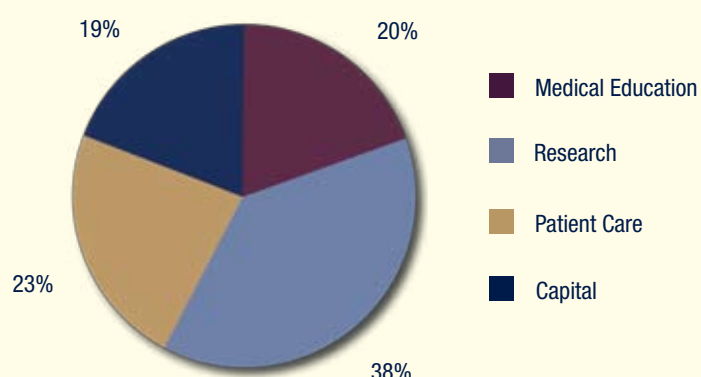
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## BAYLOR HEALTH CARE SYSTEM FOUNDATION DISTRIBUTION REPORT

In its 30th year, Baylor Health Care System Foundation distributed \$27,648,000. This represents a 34.74 percent increase over fiscal year 2007. Here's what the funds supported:



## ON THE BOARD

TOM DUNNING

**B**AYLOR HEALTH CARE SYSTEM FOUNDATION Board member **Tom Dunning**, the former chairman of Lockton Dunning Benefits, is the immediate past chairman of the Dallas Citizens Council and served as Dallas' homeless czar. He is vice chair of the State Fair of Texas, serves on the Southwestern Medical Foundation Board, and is a member of the Salesmanship Club of Dallas.

### What is your favorite thing about Baylor?

The unsurpassed quality of Baylor's physicians, facilities and staff. I also really like Rev. George Truett's creed upon which Baylor was founded and that it hasn't changed in 100-plus years:

"Is it not now time to build a great humanitarian hospital, one to which men of all creeds and those of none may come with equal confidence?"

### What Foundation project are you passionate about? How are you involved in it?

The emergency department. I have had the opportunity to watch the growth of the ED since 1973



Tom Dunning

when my close friend, **Leonard Riggs, M.D.**, joined the ED team. Fortunately for Baylor and for Dallas, Dr. Riggs saw the need to continuously expand the number of doctors and staff in the emergency department as well as its size.

### Describe your family.

I have been married to **Sally**, my sweet and beautiful wife, for 36 years. We are the proud parents of **Meredith**, who is completing her master's degree at St. Edward's in Austin, and **John Helms**. He and his wife, Jennifer, are attorneys in Dallas. We also are the proud grandparents of **Jack Dunning Helms**.

### Do you have a childhood experience that shaped how you think?

Two important experiences impacted my life. Every summer, I would visit my cousins who lived for several years in government projects in Columbus, Ohio. I saw first-hand what a struggle it was for very low-income families to make ends meet and to live in a neighborhood where there were fights, police and poverty. While in

high school, I worked a summer in an aluminum smelting plant which employed immigrants from Mexico. The following summer I worked in a warehouse with African Americans. These men became my friends, and I realized there was no difference between me and them except the color of our skin and the prejudice they faced daily. It helped me at an early age to better understand prejudice and that friendship could and should cross cultural and racial lines.

**I am most proud of ...** receiving the Linz Award in 1999.

**Most would be surprised that ...** I like opera.

**When I meet someone, the first thing I notice is ...** if he/she projects warmth and sincerity.

**What lesson did you learn the hard way?**

There are no shortcuts.

**What movie character would you like to portray and why?**

Atticus Finch in *To Kill A Mockingbird* because of his respect for others, regardless of their race, economic status or position in the community; his standing up for what is right; and his relationship with his two children.

## Nurses share stories with board members

**T**HERE MAY BE a national nursing shortage, but there's no lack of inspiration and passion among the nurses at Baylor Health Care System.

At its December meeting, the Baylor Health Care System Foundation Board of Directors heard about nursing's challenges and rewards from four nursing leaders.

"By 2020, we will be short 1 million nurses in the U.S.," said Rosemary Luquire, R.N., Ph.D., Baylor's chief nursing officer. "We need 300 to 500 nurses within Baylor at any given time."

Baylor's *Advancing Nursing Excellence* initiative helps attract and retain qualified staff. Donor funds will allow nurses seeking advanced nursing education to work part time while in school. An annual scholarship costs \$30,000, and \$60,000 funds a full two-year scholarship.

**Rosemary Hill, B.S.N.**, a critical care oncology nurse on the blood and bone marrow transplant unit at Baylor University Medical Center at Dallas, was working in computer science when the loss of her aunt to ovarian cancer moved her to seek a new career.

"I was able to stay with her when she was in the hospital," Rosemary said. "She didn't know what questions to ask." Rosemary graduated from the Louise Herrington School of Nursing of Baylor University in 2005 and joined the Baylor staff in early 2006.

**Olha Prijic, B.S.N.**, clinical manager of the New Family Center, brought an innovative South American technique for caring for premature babies to the neonatal intensive care unit in 1992.



Rosemary Hill, Olha Prijic,  
Rosemary Luquire and Elester Stewart

Kangaroo Care allowed parents to become more involved with their previously isolated babies.

"A woman named Tammy delivered at 23 weeks, and I was determined to let her be a mom," Olha said. "She would put the baby on her chest, and it would be calm. Now, parents are parents."

**Elester Stewart**, vice president of cardiovascular and medicine services at Baylor Dallas, learned early that communication is key to a nurse's success when both of his parents were hospitalized.

"I was 19 years old, and I was very scared," Elester said. "There were seven doctors, and they were giving seven different scenarios. I went into respiratory therapy so that I could help families make critical decisions about what was needed."

Elester has since earned Master of Science in Nursing, Registered Nurse and Master of Health Administration degrees while working full time. He is working on his Ph.D.

For more information about Advancing Nursing Excellence, please contact Ellen Dearman at 214.820.7877 or Ellen.Dearman@BaylorHealth.edu.

## Bernstein gift funds nursing scholarships

**A** LOVE for Baylor Health Care System and expressing thanks through philanthropy has become a tradition for Baylor Health Care System Foundation board member **Richard Bernstein** and his family.

Richard's father, **Seymour**, gave a portable heart monitor after being treated at Baylor for two heart attacks. His mother, **Margery**, a Baylor breast cancer survivor, established charitable trusts that provided for her children and Baylor.

When a trust in the name of Richard's sister, **Patricia**, matured last year, leaving \$228,199 in assets, Richard designated that it fund eight annual nursing scholarships through the *Advancing Nursing Excellence* program, according to his mother's wishes.

"To me, education is leverage," Richard said. "You educate one nurse, and how many other people does that nurse touch?"

As a business appraiser, Richard helped Baylor receive many substantial gifts. His proudest Baylor moment came when he helped connect the Foundation with a significant donor.

"I've seen money become a divisive factor in families, but I've also seen how philanthropy brings families together through shared projects and activities," Richard said.

Richard retired in 2006 and is active in a "second career" of helping charities. His wife, Phyllis, has been engaged in charity work throughout her life. The Bernsteins have made their commitment to Baylor and are involving their children, **Brad** and **Elizabeth**, in their philanthropy.

And the next generation of philanthropists arrived this year. Richard's granddaughter, **Farryn Leah Bernstein**, has a wonderful family model for giving.

For more information about Advancing Nursing Excellence, contact Ellen Dearman at 214.820.7877 or Ellen.Dearman@BaylorHealth.edu.

## Baylor Dallas named a Nursing Magnet facility again

**T**HE QUALITY of the nursing program at Baylor University Medical Center at Dallas has been recognized again with redesignation of the hospital as a *Nursing Magnet facility*.

Only two percent of hospitals in the United

States receive this designation from the American Nurses Credentialing Center, which appraises facilities on the basis of 14 standards that exemplify excellence in nursing.

Baylor Dallas was first recognized with the four-year designation in December 2004.



## GIFT PLANNING

## Advisors attend charitable gift planning event

**P**HILANTHROPIC FAMILIES often have difficulty passing their ideals on to their descendants along with their money.

On Dec. 3, a small group of legal and financial advisors listened at The Crescent as members of the Wayne family — **Ernestine “Ernie” Wayne** and her children, **Sue Wayne Strauss** and **Jon Wayne** — described how they had found a valuable philanthropic partner in Baylor Health Care System, and how their extended family had come to understand the joy of giving. The conversation was moderated by Brown Brothers Harriman & Co. managing director **Scott Clemons**.

“All your clients have a passion. They want to leave a legacy of some sort,” Jon told the advisors. “They need to invest in that part of their lives. We were lucky to find Baylor. It’s easy to write a check, but without a partner like Baylor, you can’t make it happen.”

Having a creative advisor helps, Sue said.

“Not only did we have a partner in Baylor, we also had a partner in our legal advisor,” she said. “**Sandy Bisignano** helped us find the way. As a family, we have, hopefully, started a legacy for our children and our children’s children.”

The next night, Scott spoke to the Dallas Estate Planning Council at The Fairmont Dallas about helping clients give their descendants a financial education. Both events were sponsored by Baylor Health Care System Foundation, which is an advocate for professional education on charitable gift planning.



“The first generation is most interested in transferring their values with the wealth,” Scott said. “Advisors are good at understanding how to transfer wealth, but we could be of more use by discussing the why so future generations know why the wealth is there.”

Scott said it’s never too soon to start educating the next generation about how to be “good with money,” and that children should be entrusted with enough money with no strings attached to learn from personal trial and error.

The advisors in attendance felt it was an exceptional event. “This event was one of the best you have put on,” said Steve Maus of The Nautilus Group. “It was wonderful to hear one of your donors tell us what their advisor’s planning has meant to their family and to Baylor.”

For more information on gift planning, contact Cynthia Krause at 214.820.7928 or [Cynthia.Krause@BaylorHealth.edu](mailto:Cynthia.Krause@BaylorHealth.edu).

## Want shrink-free income? Gift annuities can provide it

**I**N THESE TROUBLING ECONOMIC TIMES, there is still a gift planning arrangement that provides a consistent return: the gift annuity.

For the rest of the donor’s life, Baylor Health Care System Foundation will send a check every quarter, or annually if preferred. The amount will be the same every time. While the economy may rise or recede, the payments will remain the same, resulting in a shrink-free source of income.

The amount received every year is determined in advance and depends on several things, including age and the amount given to establish the gift. For example, a 75-year-old will receive more than someone 10 years younger who gives the same amount. The arrangement can also be set up to benefit both the annuitant and the

spouse for both their lifetimes.

Furthermore, for the rest of his or her life, the donor will enjoy the satisfaction that the gift annuity will someday provide Baylor with needed financial resources. Letting the Foundation help with lifetime support enables it to serve future generations with their health care needs.

The Internal Revenue Service favors these arrangements and provides the donor with an income tax charitable deduction. It is one way the government encourages the private sector to support the charitable community.

Year in and year out, the charitable gift annuity is the most popular life-income gift planning vehicle available.

To learn more about gift annuities, contact Cynthia Krause at 214.820.7928 or [Cynthia.Krause@BaylorHealth.edu](mailto:Cynthia.Krause@BaylorHealth.edu).

## Sample rates for a \$25,000 single life gift annuity\*

Annuitant Age at Gift	Age 65	Age 70	Age 75	Age 80	Age 85
Annuity Rate	5.3%	5.7%	6.3%	7.1%	8.1%
Charitable Deduction**	\$8,684	\$10,085	\$11,358	\$12,730	\$14,196
Annual Payment	\$1,325	\$1,425	\$1,575	\$1,775	\$2,025
Tax-free Portion	\$820	\$938	\$1,101	\$1,305	\$1,590
Ordinary Income Portion	\$505	\$487	\$474	\$470	\$435

\*Minimum gift of \$10,000. \*\* Deduction will vary slightly with changes in monthly IRS discount rate. Assumed rate of 3.6%.



## From the Chairman

**N**ow that the political season is over and our nation’s orderly transfer of power has occurred, I thought that it might be time to reflect on what President Obama’s new health care plans might mean for Baylor Health Care System.

President Obama begins his term with a very significant 76 percent approval rating. It is significant because it appears that the American people have given him a mandate for change.

But with Tom Daschle’s withdrawal from consideration as Secretary of Health and Human Services and White House advisor on health care reform, that change may be slower in coming. Daschle is someone who knows how to craft and pass legislation. His appointment could have moved it quickly during the honeymoon phase of the new administration and created health care reform during the first 100 days.

The Senate clearly began taking the lead on health care reform last year by holding hearings on this subject. The focus is on:

- Expanding health insurance coverage, and public vs. private plans
- Health information technology increases with concerns about standards and privacy
- The future of Medicare and Medicaid: meaningful payment reform vs. continued cost shifting
- Drug and device innovation
- Defining the government’s role

The president has strong support with Speaker of the House Nancy Pelosi and House Energy and Commerce Committee Chairman Henry Waxman. Their challenge will be to manage disparate political philosophies within their own party.

The first order of business will be to re-authorize and expand the State Children’s Health Insurance Program (SCHIP). It remains to be seen how and whether this administration and Congress can do something about the rising numbers of uninsured Americans. This is a dilemma that affects all Americans and no state more than Texas, where more than 25 percent of our citizens are uninsured (the highest rate in the nation).

I can only hope for some wisdom and leadership which can address these issues.

Leonard M. Riggs, Jr., M.D.  
Chairman, Board of Directors  
Baylor Health Care System Foundation

Baylor’s office of governmental affairs, headed by Kristi Sherrill-Hoyl, helped prepare these comments.

**R**OXANN GARCIA has raised millions of dollars for others in almost 21 years of fundraising. But she's managed to keep something for herself, too.

"All the places along my job train have brought me something unique," Roxann said. "But what is the most important are the people I've met. Every place I've worked, I made close friends. And I've kept them."

Roxann, a director of development who has been with Baylor Health Care System Foundation since July 2004, has lived in Dallas her entire life.

"I'm not a mover," Roxann said. "We have family and friends in other places that we visit, but we always come home to Dallas. My dad's from a pioneer family that came to Texas in 1843, when it was still a republic. Most of my extended family lives within a couple of hours of Dallas. It's home."

That special connection makes Roxann passionate about the Foundation's Southern Sector Health Initiative, a program designed to improve care and save the lives of people with diabetes in the Fair Park area.

"To me, it's such a high-need project in Baylor's neighborhood. And it's a neighborhood I remember from childhood," she said. "My mother grew up across the street from Fair Park, and I see an opportunity for Baylor to work with the community to bring some real hope for better health care."

Roxann graduated with a bachelor's degree in English from the University of North Texas and earned a Master of Liberal Arts degree at Southern Methodist University. She's married to Tony, with whom she'll celebrate her 25th wedding anniversary this year with a two-week trip to Costa Rica.

"This is the longest vacation we've been on



Roxann Garcia

together in 25 years," she said. "It may take us a month to get over it."

She came to the Foundation from HOSTS Learning, a company based in Vancouver, Washington. But even then, she was able to telecommute and stay home in Dallas.

"I worked with people who were in Chicago, Southern California, Michigan and Columbia, South Carolina," she said. "There were about 150 people, and none of them worked in the Vancouver office."

Although she's collected so many friends over the years, Roxann says her closest friend was one of the first people she ever met.

"My dad was a World War II veteran, and we shared a love of that period in history," she said. "I enjoyed hearing him talk about his time in the South Pacific and how it changed his life. My dad was my best friend."

## Perot Systems gift helps patients be kids

**P**EROT SYSTEMS HAS MADE A GIFT to help children recovering at Our Children's House at Baylor take their minds off their medical worries for a while.

The Plano-based information technology services provider donated two flat-screen TVs with DVD players, several DVDs and a large piece of colorful artwork created by participants in the American Heart Association's 2008 Dallas Heart Walk.

In keeping with the community art theme, several Our Children's House patients created their own artwork, drawing and coloring as the presentation was made.

Our Children's House at Baylor is a licensed pediatric rehabilitation hospital. The facility serves children from infancy to age 18 who need specialized medical care and treatment for developmental and birth disorders, traumatic injury and severe illness.

"Our child life specialists commit themselves to making the hospital feel like home, a place where the children not only receive the very best care possible, but also have a way to get away from the care and just be kids," said Baylor Health Care System Foundation president Rowland K. Robinson. "Gifts like these from Perot Systems help make that possible."

For more information about supporting Our Children's House, contact Roxann Garcia at 214.820.8196 or Roxann.Garcia@BaylorHealth.edu.

## Brignonnet joins BRI as vice president, COO

**B**ERNARD BRIGNONNET has joined Baylor Research Institute (BRI) as vice president and chief operating officer.

Under his leadership, the institute will further pursue the development of unique research technologies in areas such as immunology, transplantation, metabolic disease, cardiovascular disease and colon cancer.



Bernard Brignonnet

In addition, Brignonnet will oversee the more than \$40 million annual budget of the institute, which has grown in 10 years to become a major clinical research program. He will also partner with Baylor Health Care System Foundation to facilitate the development of more philanthropic support for research at Baylor University Medical Center at Dallas.

"Baylor Dallas is increasingly becoming a

leader in medical research, and we hope to license our advanced technologies in the marketplace to reach even more patients who need them," said BRI president **Michael Ramsay, M.D.** "Mr. Brignonnet has a tremendous vision of where BRI can take the Baylor Health Care System, and we are very excited to have someone of his caliber take us to the next level."

A native of France, Brignonnet has more than 30 years of experience in the biotechnology and pharmaceutical industries, in which he has served in a senior leadership capacity for a number of international organizations. He was most recently the CEO of Medicen Paris Region, where he helped create one of the largest collaborations of research institutes, pharmaceutical and biotechnology companies as well as public and private universities following an initiative by the French government to support world-competitive clusters for innovation in life sciences.

For more information about supporting Baylor Research Institute, contact Roxann Garcia at 214.820.8196 or Roxann.Garcia@BaylorHealth.edu.

## Holiday gifts for patients

**D**ONORS TO BAYLOR HEALTH CARE SYSTEM FOUNDATION helped bring some holiday cheer to patients' rooms this Christmas.

The Foundation presented 130 penguin-themed gift packages to patients requiring care at Baylor University Medical Center at Dallas over the holidays. The gift canisters were filled with candy and pretzels.

The gifts were presented with the help of the nursing staff at Baylor Dallas in honor of the donors whose contributions made them possible.

"We are pleased that we were able to bring a little bit of holiday happiness to those who weren't able to spend the holidays in their homes with their families," said Foundation president Rowland K. Robinson.



### *the torch* survey

We would love to hear from you. Please go to [www.thetorchsurvey.com](http://www.thetorchsurvey.com) to complete a short survey about *the torch*, the newsletter of Baylor Health Care System Foundation.

To learn more about any Baylor Health Care System Foundation initiatives, contact the Foundation at 214.820.3136 or e-mail [thetorch@BaylorHealth.edu](mailto:thetorch@BaylorHealth.edu). Write to us at 3600 Gaston Avenue, Barnett Tower Suite 100, Dallas, TX 75246-1800.