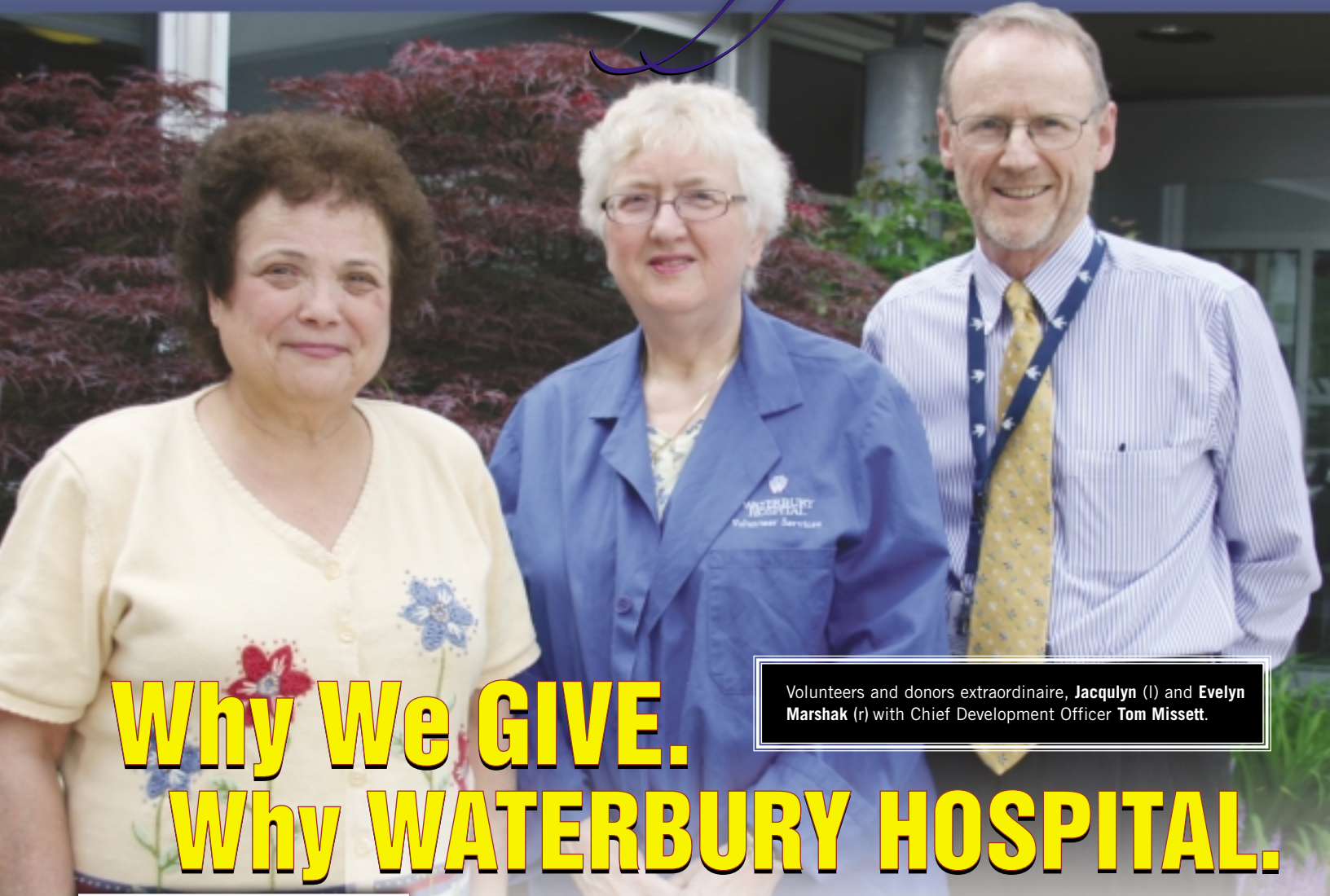




Making a Difference

SPRING/SUMMER 2009



Volunteers and donors extraordinaire, **Jacquelyn (l)** and **Evelyn Marshak (r)** with Chief Development Officer **Tom Missett**.

**Why We GIVE.
Why WATERBURY HOSPITAL.**

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A Donor Profile

Evelyn and Jacquelyn Marshak are familiar faces at Waterbury Hospital. The story of these two sisters' ties to the hospital is both interesting and inspiring.

What many people recognize about Evelyn and Jackie is that they are long-time hospital volunteers. Evelyn (a retired teacher and current journalist and editor) has been a volunteer at Waterbury Hospital for 26 years, the last 19 in the Emergency Department, and pinch-hits where volunteers are needed elsewhere, too, such as at the information desk. Jackie (a semi-retired teacher who still subs) has for years been a volunteer knitter of caps for hospital newborns and was a longtime volunteer at the Gift Shop. Both are familiar faces at many hospital functions.

Why We GIVE. Why WATERBURY HOSPITAL.

CONTINUED FROM PAGE 1

But what many may not realize about these active sisters is the level of their financial support for Waterbury Hospital over many years, their motivations for giving, and the interesting way they have decided to contribute that support.

Some years ago, both took an interest in the opportunity to support the hospital through a "Charitable Gift Annuity," a way of making a gift that both gives immediate support to the hospital and guarantees the donor a specified level of annual income for life. (Please see the accompanying sidebar on "Another Way of Giving: The Charitable Gift Annuity.") Over the past half dozen years, they have each contributed tens of thousands of dollars to Waterbury Hospital in this manner.

When I asked Evelyn and Jackie one day what motivates their giving, and "Why Waterbury Hospital?" Jackie replied "When you have a little money, and you have your health, you're lucky. "Look around," she continued. "You see people who have so much less, without insurance, and you see important places like hospitals struggling to help them. You don't have to look far if you want to do something good." Evelyn built on her sister's remarks. "I wake up, I can dress myself. Not everyone can do that."

"There's something else, too," said Jackie. "We both have included Waterbury Hospital in our wills, but I want to do something useful with what I have when I'm still alive."

The example set by their father, an immigrant from Russia in 1912, greatly influenced the Marshak sisters' practice of giving. Pushing a cart on the lower east side of New York City, Louis Marshak made a habit of sharing what he had with his customers who had less. Waterbury Hospital is but one of several organizations who benefit from the spirit Louis instilled in his daughters – Evelyn and Jackie were both honored last year for their contributions and donations of books to Yeshiva K'Tana, a Waterbury dayschool. Evelyn is quick to point out that the sisters' support for each other enables each to contribute as volunteers. "I couldn't do what I do here if Jackie were not home making sure there'd be a supper for both of us."

Both Evelyn and Jackie have been patients at Waterbury Hospital and speak with glowing gratitude about the staff and the level of care they received. It was her back surgery, says Evelyn (who was born at Waterbury Hospital), which led to her volunteering. She has loved "becoming part of the team in the E.D." and making such a difference to the people who arrive there needing assistance.

Waterbury Hospital is grateful for the tireless volunteerism of these two sisters, their meaningful financial support, and their advocacy for our hospital in our community. We are grateful, too, that they allowed us to share their story in the hope that it might inspire others.

Tom Missett
Chief Development Officer

ANOTHER WAY OF GIVING: THE CHARITABLE GIFT ANNUITY

A way of giving, which appeals to a number of donors, is the Charitable Gift Annuity.

Essentially, a Charitable Gift Annuity is a contract between the donor (you) and a charity (Waterbury Hospital). It works like this:

- The donor makes a gift of a certain amount (minimum amount is \$5,000; maximum unlimited).
- The charity agrees, and is legally bound, to provide a guaranteed annual stream of income to the donor for the remainder of his or her life, or to a beneficiary named by the donor. For married couples (or actually any two individuals, related or unrelated) making a single Charitable Gift Annuity, the annual income is guaranteed until the death of the second person.
- How much income? The payout rate varies, depending on several factors, including the donor's age, and is recalculated for new annuities each year by the National Council on Gift Annuities. The rate is based on life-expectancy tables (e.g., the older the donor, the higher the payout rate). Payments to the donors may be annual, semi-annual, quarterly, or monthly. The CGA rate is almost always more attractive than rates found in commercial annuities.
- The gift is irrevocable.
- The Charity invests the principal, from which the payments to the donor are made. Payments cease at the donor's death, and the remaining principal is freed up for the charitable purposes of the organization (the hospital).
- Prudent investment growth helps to offset the payments to the donor, and the final distribution to the Charity (the amount remaining at the time of the donor's death) will be close to the amount of the original gift.
- Payments may begin immediately; OR, the donor may opt to defer the first payment to a later year, while the fund grows, ensuring a higher principal and payout.
- Tax advantages: The donor receives an initial tax advantage for the year in which the contribution is made, AND subsequent advantages in the following years. The hospital provides an illustration at the time of the contract, and subsequent annual statements for tax purposes.
- CGAs may be funded by cash, stock, real estate, or U.S. Savings Bonds. **AND** you would pay no capital gains tax on the transfer of your gift.

Above all, if this way of giving is right for you, your gift advances the mission of Waterbury Hospital.

Several donors contribute to Waterbury Hospital in this way, with some of them taking new annuities yearly. Some donors have been known to contribute their annual annuity income back to the organization to support The Annual Fund or some other hospital need. All Charitable Gift Annuity donors are recognized as members of our "Society for Tomorrow" (comprised of people who have included Waterbury Hospital in some fashion in their estate planning).

As always, Waterbury Hospital advises its friends to consult with their own financial advisor or attorney when making decisions such as these. The Development Office is also happy to assist with questions you may have, or to discuss with you any other type of planned gift arrangement, including simple bequests. Please contact **Tom Missett** at 203-573-6029 or tmissett@wtbyhosp.org for more information.

Waterbury Hospital Donor Appreciation Reception

An Expression of Gratitude

Sprays of forsythia greeted the nearly fifty donors who gathered in Waterbury Hospital's Bizzozero Conference Room on the evening of April 22, 2009 for the Annual Donor Appreciation Reception. Attendees enjoyed strolling through the room to the various appetizer food stations while listening to classical music performed by a Waterbury Youth Symphony trio.

The event has become an annual Spring kick-off for many of the hospital's faithful donors. It is a reunion for many and a time to forge deeper friendships. **Christopher Michos, MD**, Chairman of the Emergency Department, shared his enthusiastic appreciation for the Waterbury Hospital community. The Emergency Department was the recipient of the proceeds from the 2007 hospital gala and golf benefits, and Dr. Michos expressed gratitude and told the group all that has been accomplished due to the generosity of the greater Waterbury community. He drew laughter from the crowd as he unfurled a nearly five-foot long "short wish list" for the Emergency Department.

Hospital President and CEO **John Tobin** then reported on the state of the hospital in difficult economic times. He prefaced his remarks with the good news that The Heart Center of Greater Waterbury had been awarded permanent status by the State of Connecticut earlier in the year. More sobering was his report on the difficult measures necessary in this economy. But he reassured the group that Waterbury Hospital, the fourth hospital to be established in Connecticut, has been serving its community well for over a century, and will continue to do so despite a few bumps in the road.

The heartfelt thanks expressed that evening assured the hospital's donors of the important role their generosity plays in improving the hospital's fiscal health. Whether the gift is "unrestricted", or given to support a specific area or need, the hospital depends on the support of its friends, a message delivered with gratitude, and one well understood by this audience.

BELOW


TOP LEFT: **Shirley** and **John Michaels** speak with a colleague

TOP RIGHT: (from left) **Rosemary Garretson**, **Mary Ferro**, and **Bob Garretson**, faithful donors and faithful volunteers

BOTTOM LEFT: Waterbury Hospital President and CEO **John Tobin** with **Jack Smith**.



Have you made your
Annual Fund
gift yet this year to Waterbury Hospital



The "Annual Fund" is the life-blood of all giving programs, and supports the mission of the organization.
(Attn: Fund Development at Waterbury Hospital)



18th Annual tgif (Thank God I'm Female) benefits The Children's Behavioral Health Program at Waterbury Hospital.

For nearly two decades, Waterbury Hospital has promoted women's health through a popular women's wellness forum entitled "tgif" ("Thank God I'm Female"). Always held on a Friday night, this girls' night out combines food, fun, and education on a timely medical topic. On May 8, 2009 nearly 400 women gathered at Waterbury's Villa Rosa Wedding and Banquet Facility (The Ponte Club) to hear **Adriana Blanco, MD**, speak on Osteoporosis. The banquet rooms radiated purple from the pansy centerpieces and napkins to the baskets full of purple Mardi Gras beads.

A chief attraction of this year's tgif was the addition of popular TV personalities **Scot Haney** and **Teresa LaBarbera** as emcees. Attendees arrived promptly to mingle with these WFSB Channel 3 stars during the Sponsor and Vendor Bazaar which opened the evening. Many guests had their pictures taken with the duo, while all enjoyed the harvest tables of crudites and the cash bar. The banquet room walls of the Villa Rosa were ringed with over forty tables promoting local health agencies and vendors selling jewelry, cosmetics and the like. Women eagerly collected literature and samples in the signature purple bags received as gifts at the door.

As dinner began, **Donna Johnson**, tgif Committee Chairperson and liaison for Diagnostic Radiology and Connecticut Center for Advanced Vein Therapy (the event's Premier Sponsors) introduced the Hospital's Chief Operating Officer, **O.** After welcoming the guests and bestowing gifts on two women at the event who had attended all eighteen tgif events, Ms. Prybylo introduced Dr.

Blanco, a board-certified rheumatologist, an ISCD certified bone densitometrist, and an attending physician at Waterbury Hospital. Her talk emphasized that osteoporosis, though wide-spread, need not happen if precautions are taken. Proper calcium intake coupled with adequate sun exposure are two highly important measures. After the age of fifty all women should have a bone density test to create a baseline. Since osteoporosis develops painlessly, knowledge and proper health habits are key. Dr. Blanco concluded her presentation by answering questions submitted by the attendees to Scot Haney, who had a bit of fun tweaking the audience about his minority status as a man at the event.

After the Q & A time ended, a team of physical therapists from Access Rehab Centers demonstrated a half dozen exercises to counteract the slumping posture that incipient osteoporosis (osteopenia) creates. Each tgif guest received a handout to remind her how to do the easy exercises. Then a light-hearted exercise game, "heads and toes," was played by all attendees who had purchased a necklace of purple beads. The winner received a tour for four of the Channel 3 Studio, passes to attend a "Better Connecticut" taping, and four tickets for a Palace Theater show. A tea cup raffle of over forty items was hosted by Scot and Teresa, as were the vendor table raffles. The winnings added to the evening's fun and played a significant part in the event's netting over \$10,000 to benefit The Children's Behavioral Health Program at Waterbury Hospital. To sum it up, everyone who attended this year's tgif had a bone-rattlin' good time.



Health education, fun and camaraderie highlighted the evening for all attendees.



MAGIC FILLED THE AIR AT THE 2008 HOSPITAL GALA

Magic was in the air on the night of November 15, 2008 at Waterbury Hospital's 9th Annual Charity Gala. Nearly 600 formally-attired guests gathered in the elegant ballroom of Waterbury's Holiday Inn to celebrate "A Night of Illusion" and to raise over \$60,000 for the Surgical Services Department. Gazing ball centerpieces nestled in shimmering swaths of pink, purple and black fabric made the tables glow while live music from the Harold Zinno orchestra filled the room. Pastoral Care coordinator **Rev. Richard Bollea**, in tails, top hat and cane set a high fashion note.

During dinner noted illusionist David Garrity performed a lively act filled with astounding effects. He added to the evening's merriment by drafting several audience members to perform with him.

The Humanitarian Award was presented to **Vickie Luddy**, who has served the hospital for over 22 years in various roles including Hospital Auxiliary President. One of her favorite activities is passing out teddy bears to reassure and calm the fears of children in need of medical procedures. **Linda Hamid**, current Auxiliary President, praised her for embodying "the virtues that we all admire but few attain."

Funds were raised by a "Martini Bar" diamond raffle, a silent auction, and a live auction. The raffle's diamond and pearl necklace and earrings set was donated by ONYX II Jewelers of Watertown. During the live auction portion of the evening, ten young people

from the Drama Club at Holy Cross High School pantomimed such prizes as an island getaway to St. Lucia and a bathroom makeover. They wore intricate, colorful costumes loaned from Torrington's Warner Theatre, and wielded a variety of amusing props such as back scrubbers and outrageous golf attire. Over one hundred silent auction baskets covered tables circling the Connecticut Ballroom. Many hospital departments contributed beautiful baskets which had previously been entered into a hospital-wide contest. The rest were donated by a range of supportive businesses from the Greater Waterbury region.

Hospital President and CEO **John Tobin** praised the Surgical Services Department for touching the lives of over 10,000 people in 2008. The goals of this department, he explained, are to enhance patient care, and maintain preparedness for the community's increasing need for surgical services. **Scott Kurtzman, MD**, Chairman of the Department of Surgery at Waterbury Hospital and **Ann Marie Thomas**, Administrative Director of the Department of Surgical Services, were extremely thankful for

the funds raised, stating that the event went a long way toward helping the department meet its goals.

The Waterbury Hospital Annual Charity Gala 2008 demonstrated that when business and hospital communities join together, good things magically happen.



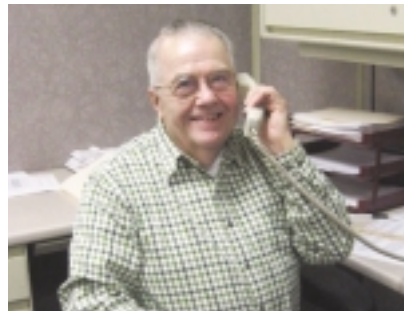
2008 Evergreen Thankathon

Over 1,800 "thank you" calls were made by a tireless team of volunteers during a three-day period last fall. The goal was to contact each 2008 donor to Waterbury Hospital Evergreen Club 50's annual fundraising drive. An annual event for several years, organized by the joint efforts of the Evergreen Club 50 program coordinator and the Fund Development Department, this massive Thankathon was a great success.

Each night from 5:00 PM – 7:30 PM approximately a half dozen volunteers worked the bank of phones. The volunteers, who were drawn from among the Club's Advisory Council, Evergreen Club 50 members, Hospital Auxiliary and the hospital staff, enjoyed a great time of fellowship during a light dinner provided for them before reporting to their evening's shift of calls. Evergreen Club 50 members not only support the Fund Development's annual appeals, but also contribute to and attend the Hospital's special events. During fiscal year 07-08 members contributed nearly \$95,000. The efforts of this committed group of volunteer callers ensured that every single one of these committed donors received a personal acknowledgement.

Thankathon callers and Evergreen Club 50 members **Bob** and **Rosemary Garretson** have taken the opportunity annually to personally thank their fellow members, and have expressed many times how surprised members are to receive a call thanking them for their contribution, instead of asking for one.

PICTURED:
(from left to right)
Rev. Richard Bollea,
Bob Garretson, and
Gege Pelletier
calling to express
personal thanks to
Evergreen
Club 50 donors



PICTURED: (left to right) **John Roman**, President and CEO of Naugatuck Valley Savings & Loan; **Mrs. Joan Reed**; **Mrs. Linda O. Hamid**, President, The Waterbury Hospital Auxiliary, Inc.; **Monica Giacomi**, Assistant Director, Department of Cardiology Services; **Joanne Borduas**, Director of Outpatient Services; **John Tobin**, President and CEO, Waterbury Hospital; **Mary Prybylo**, Vice President and COO, Waterbury Hospital; **David Reed, M.D.** (absent donor: The Maximilian E. and Marion O. Hoffman Foundation)

A NEED WELL MET

Over the span of a few months in late 2009, four donors came together to collectively contribute \$100,000 and help Waterbury Hospital achieve its goal of installing new, state-of-the-art equipment in the Cardiopulmonary Rehab area of the Reed Cardiology unit for the benefit of hundreds of area patients who receive continuing care there.

On May 27, 2009, a reception was held in the department to publicly thank the donors and to display the new equipment.

The equipment includes several new exercise machines which are used continually each day from 6:30 am until 5:30 pm. The centerpiece of the new equipment is a monitoring system which monitors each patient using the exercise machines as part of a specific plan for their continuing cardiac care.

The Cardiopulmonary Department provides cardiac and pulmonary patients, from their mid-twenties to their mid-seventies, with individu-

alized medical services from diagnosis to rehabilitation. Equipment plays a critical role in the rehab. Treadmills, arm ergometers, Nu Step and other machines are vitally important in providing appropriate exercises for cardiac and pulmonary patients, both in the short term and the long term following their surgeries. Waterbury Hospital performs approximately 375 angioplasty procedures per year, and the sessions allow patients to progress in their customized exercise program while their cardiac status is being monitored by a registered nurse.

The four donors are **The Waterbury Hospital Auxiliary Inc., Dr. and Mrs. David Reed, The Maximilian E. and Marion O. Hoffman Foundation** of West Hartford, and **Naugatuck Valley Savings & Loan**-an exemplary funding partnership of a service organization, two individuals, a charitable foundation, and a corporation - diverse donors, working together.

Gifts in Tribute

The following tributes were received between October 1, 2008 and May 31, 2009. All gifts help provide the best health care to the residents of our community.

Gifts in Tribute provide an opportunity to:

- Honor a physician or nurse who has touched your life
- Celebrate a special event such as an anniversary or birthday
- Honor the memory of a loved one
- Commend a friend or mentor

In Memory of:

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A Reliable Partner..



Webster Bank, a leader among Waterbury Hospital's "Corporate Partners in Philanthropy", has long been a supporter of Waterbury Hospital events, appeals and special needs. On a recent visit to the Hospital, Webster Bank Regional President **Rick O'Brien** (left) delivered the good wishes of Webster Bank along with meaningful support for 2009 to **John Tobin** (center), Hospital President and CEO. Chief Development Officer **Tom Missett** is at right.

Save The Date
SATURDAY, NOVEMBER 21, 2009

Let's Celebrate

WATERBURY HOSPITAL'S TENTH ANNUAL CHARITY GALA
BENEFITTING WATERBURY HOSPITAL'S CRITICAL CARE UNIT

2009



WATERBURY
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WITH ANY QUESTIONS REGARDING THIS PUBLICATION.

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