



# PHILANTHROPY IMPACT REPORT

2024



CARILION CLINIC  
FOUNDATION

Carilion Clinic traces its roots to 1899, when the Roanoke Hospital Association was established as a not-for-profit, charitable organization with the mission of providing healthcare to citizens regardless of their ability to pay. Although Carilion has evolved over the years from a single hospital to a nationally recognized system, **we continue to rely on the generous support of donors to advance our mission.**



1900

With contributions from donors, businesses and citizens, Roanoke Hospital opens at the base of Mill Mountain on June 30.



1950

When polio patients overwhelm the hospital, the Society for the Crippled of Southwestern Virginia helps build and equip a 30-bed children's ward and the hospital is renamed Memorial and Crippled Children's Hospital. Local donors match federal and state funding, adding 70 more beds.



To sustain operations, the hospital accepts a wide range of donations – oats, sugar, magazines, night shirts and homemade jams and jellies.



1924-25  
The hospital expands with the additions of the North and South units. David W. Flickwir, a Norfolk & Western executive, pays the entire \$100,000 cost of the North Unit as a memorial to his wife.



1967  
Community Hospital of Roanoke Valley opens following a public campaign that raised \$3.2 million, today's equivalent of nearly \$30 million.



1985

Roanoke Memorial remains in operation during the catastrophic flood of 1985, with clinicians even delivering a baby by flashlight. Life-Guard rescues more than 200 people stranded by floodwaters.

1988 - 2008

Carilion expands beyond the Roanoke Valley to meet the healthcare needs of the entire region with the addition of Franklin Memorial, Radford Community (pictured), Giles Memorial, Stonewall Jackson and Tazewell Community hospitals.



2010

Together with Virginia Tech, Carilion establishes the Virginia Tech Carilion School of Medicine and Research Institute, anchoring a regional hub for health sciences that spurs continuous economic development.



2019-2024

A \$100 million campaign—the largest in Carilion history—to fund a new cancer center begins. To honor a historic \$25 million contribution from U.S. Ambassador Nicholas F. Taubman and Jenny Taubman, the building is named the Carilion Taubman Cancer Center.



With land generously donated by the gas company and funds contributed by the railroad, Roanoke Hospital opened its doors on June 30, 1900. Perched atop Mill Mountain, it was celebrated as a "monument to the energy, public spirit, and generosity of Roanoke's people."

Today, 125 years later, that hospital has evolved into the flagship of Carilion Clinic, a nationally recognized health system. Throughout this remarkable journey, one thing has remained constant: the enduring power of partnerships within our community.

The past year exemplifies how our shared commitment to advancing healthcare continues to transform lives.

When Hurricane Helene swept through Southwest Virginia, leaving devastation in its wake, our Employee Emergency Fund—supported entirely through our annual employee giving campaign—became a lifeline for colleagues in need. This spirit of compassion and solidarity defines our community.

In 2024, patients, businesses, foundations and individuals partnered with us in unprecedented ways to achieve our shared mission:

- » A transformative \$25 million gift from U.S. Ambassador Nicholas F. Taubman and Jenny Taubman, catalyzed progress on the new Carilion cancer center, propelling us closer to our ambitious \$100 million campaign goal—a campaign that Nancy Howell Agee will continue to champion as Carilion Clinic CEO Emeritus.
- » New collaborations with the Asian American Business Owners Association, Lions Club International and others brought critical funding to enhance care for children, improve the care experience across our system and support patients facing financial hardships.
- » We were honored to renew partnerships with the Tazewell Community Foundation, Friendship, Avis Construction, Bank of Botetourt, Farrell Foundation, Cary Street Partners, Roanoke Gas and MemberOne.

As we celebrate 125 years of philanthropic support, we are inspired by the generosity that has brought us this far and by the partnerships that continue to shape our future. Together, we are transforming healthcare, creating a legacy of care, compassion and innovation for generations to come.

With gratitude,

**Steve Arner**  
President and Chief  
Executive Officer  
Carilion Clinic

**Robert G. Bennett**  
Chairman  
of the Board  
Carilion Clinic

## THEN AND NOW

On our cover:

Amanda Blake of the popular TV series *Gunsmoke* joins Roanoke Memorial executives Paul Bridge (left) and William H. Flannagan on Sept. 13, 1980, to cut the ribbon on our cancer center. Decades later, on Oct. 30, 2024, nine-year-old cancer survivor Orion Moses joins Carilion CEO Emeritus Nancy Howell Agee to break ground on the Carilion Taubman Cancer Center, marking another milestone.

## 2024 BY THE NUMBERS

The Carilion Clinic Foundation is a 501(c)(3) organization that inspires, seeks, secures and stewards philanthropic resources to enhance care for the patients of Carilion Clinic. The health system pays all administrative expenses so 100% of every gift goes directly to programs.

**\$9.6 MILLION\***  
TOTAL GIFTS

**2,481**  
DONORS

**\$97+ MILLION**  
TOTAL ASSETS

**\$598,438**  
GIVEN BY CARILION  
EMPLOYEES

**\$42 MILLION**  
ENDOWED  
ASSETS

**112.5%**  
7-YEAR  
ENDOWMENT GROWTH

**33**  
ENDOWED  
FUNDS

**\$12.5 MILLION**  
ENDOWED  
SCHOLARSHIPS

### CARILION CLINIC FOUNDATION INVESTMENT PERFORMANCE

ANNUALIZED RETURNS	1 YEAR	3 YEARS	5 YEARS	10 YEARS
<b>CARILION CLINIC FOUNDATION PORTFOLIO</b>	22.4%	6.9%	10.2%	7.7%
<b>BENCHMARK</b>	23.4%	4.4%	6.9%	5.8%

*The above data, as of Sept. 30, 2024, compares the Foundation's return with the blended benchmark return of 60%/40% - MSCI ACWI/Barclay's Aggregate.*

*\*Includes gifts to Reaching Far, Caring Close campaign.*

## MOMENTS OF IMPACT



### HONORING A LEGACY THROUGH CHAPLAINCY

The new Paul N. Bridge Chaplaincy Fund will support chaplaincy programs for patients and employees who seek spiritual guidance. The family of Paul Bridge, longtime Carilion Clinic administrator and former executive vice president, started the fund to support the program he began in the 70s.



### NEUROSURGERY TRAVELS TO NEPAL

Carilion neurosurgeon Mark Witcher, MD, PhD, led a team to Nepal to share knowledge with physicians and staff of a government-run hospital dedicated to serving the poor. They cared for more than 100 patients and performed six surgeries. A generous contribution from grateful patients Larry and Lou Ann DeHaven of Botetourt County made the trip possible.



### REMEMBERING DR. JEFFREY GEORGE

The chapel in Carilion Roanoke Memorial Hospital's new Crystal Spring Tower will honor the late Jeffrey George, MD, thanks to a generous donation from his widow, Teresa George. Dr. George was a cardiovascular surgeon at Carilion and graduate of our residency training program.



### COMFORT FOR FAMILIES AT CARILION CHILDREN'S

New sleeper sofas in Carilion Children's in-patient unit provide parents with a comfortable place to stay overnight with their children, ensuring they can remain close during critical moments. This thoughtful addition was made possible through generous donations to Children's Miracle Network.

# YES

### PROGRAM PROVIDES PATHWAYS TO SUCCESS

Each morning, Jessica Meadows prepares her children for school before heading to her job as a lab assistant at a Carilion Clinic family medicine practice in Roanoke. Between shifts, she attends classes, studies and completes assignments. Evenings are filled helping her kids with homework, after-school activities and family time.

It's a demanding schedule, but with the structure she's built—and the support of Carilion's YES (Your Efforts, Supported) program—Jessica has created a rhythm that lets her pursue her dream of becoming a registered nurse.

Launched in 2023, the YES program is open to any entry-level employee who wishes to earn certifications and further their education to achieve career goals while filling key roles within the health system. Jessica joined the first cohort, calling the program "the perfect solution" to her concerns about balancing work and family responsibilities.

"When I saw the article about YES, it felt like the program addressed all my concerns. I took it as a sign that this was my time and applied," she says.

YES was established with funding from the \$1 million John Cooker Endowment to help employees like Jessica increase their capacity to help more patients in an enhanced role. The program also received support from the Truist Foundation.

"This program is designed to help individuals who otherwise would not have the resources to advance their education," says Natasha Saunders, senior human resources consultant who helped develop YES.

Jessica's journey showcases the transformative impact of donor support, empowering Carilion employees to achieve their dreams and advance their careers so they can better care for our patients and communities.



# N I T R A D I T I O N A G R A N D T R A D I T I O N

Carilion has been a part of the Cartledge and Bennett families for generations, with George B. Cartledge Jr., George B. Cartledge III and Robert G. Bennett—all executives with Grand Home Furnishings—serving 65 years combined on various Carilion boards of directors. The family's newest Carilion board member, Ann Cartledge Hoff, joined our Roanoke hospital board in 2022.

In addition to their longstanding commitment to service, the families also have made significant contributions both personally and through the Cartledge Charitable Foundation Inc. to fund the expansion of our cancer program and new Carilion Taubman Cancer Center.

"Our family has a tradition, dating back to my grandfather and company founder, of giving back to the communities that support our business," says Bennett, chairman of the Carilion Clinic Foundation and member of Carilion Clinic's board of directors. "Supporting Carilion's plans for an expanded cancer program and new building was a natural fit."

Together, the Cartledge and Bennett families provide a powerful example of how a deep commitment to service and philanthropy can make a lasting impact.

*As a Carilion Clinic board member for more than 40 years, George Cartledge Jr. oversaw tremendous progress and, reflecting his passion for our Life-Guard helicopter fleet, our patient transport center is named in his honor. He continues to serve Carilion as director emeritus and a member of our Foundation board.*



*Members of the Cartledge Charitable Foundation Inc., including (from left) George B. Cartledge III, Mary Ann Cartledge, George B. Cartledge Jr., Robert G. Bennett, Deb Bennett Haggerty and Ann Cartledge Hoff. They are shown at the Roanoke headquarters of Grand Home Furnishings, the family business.*

## CARILION TAUBMAN CANCER CENTER A NEW ERA IN CANCER CARE BEGINS

With a historic \$25 million lead gift from U.S. Ambassador Nicholas F. Taubman and Jenny Taubman as the catalyst, health system leaders, donors and cancer survivors broke ground on the Carilion Taubman Cancer Center.

The state-of-the-art, six-story building on the Virginia Tech Carilion Health Sciences and Technology Campus will serve as a beacon of hope for the growing number of people with cancer in our region. It will replace Carilion's 44-year-old cancer facility on South Jefferson Street and marks a pivotal step toward providing world-class cancer care. Beyond expanding treatment options, the center will offer individualized support services, including nurse navigators, oncology social workers, mental health therapists and chaplains.

### A HUB FOR INNOVATION AND COLLABORATION

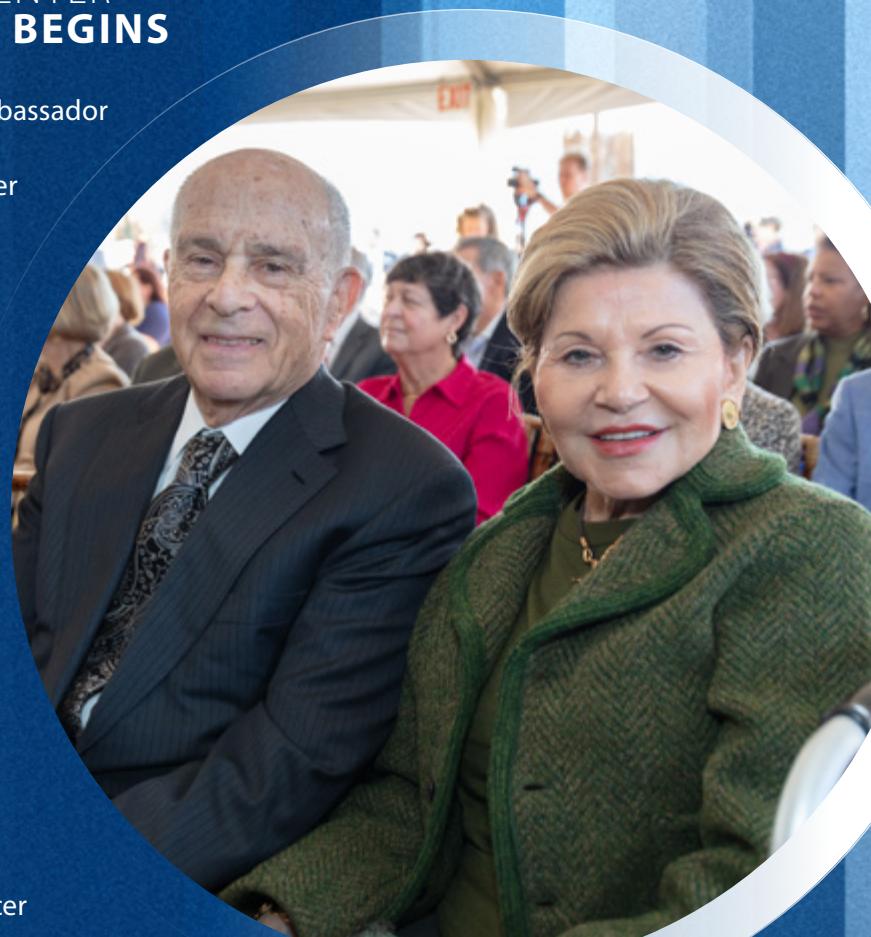
More than a building, the Carilion Taubman Cancer Center represents a bold commitment to advancing cancer care and research.

Through collaborations, including with Blue Ridge Cancer Care and Virginia Tech, the center will broaden opportunities for sophisticated clinical trials and research, ensuring patients here have access to the most advanced therapies.

Scan this QR code to watch a short video about the Taubmans and their gift.



1980 CANCER CENTER OF SOUTHWEST VIRGINIA  
2027 CARILION TAUBMAN CANCER CENTER



**"Cancer care has advanced dramatically in recent years. We believe patients here deserve access to the latest therapies, delivered in a supportive, healing environment."**

— AMBASSADOR NICHOLAS F. TAUBMAN



(From left) Chief Physician Executive Tony Seupaul, MD, CEO Emeritus Nancy Howell Agee, and President and CEO Steve Arner, break ground on the Carilion Taubman Cancer Center.

# Reaching Far, Caring Close

### CAMPAIGN OVERVIEW

In 2019, Carilion Clinic launched its most ambitious fundraising campaign, inspired by a \$1 million seed gift from CEO Emeritus Nancy Howell Agee and her husband, the Honorable G. Steven Agee. Our Reaching Far, Caring Close campaign is driving Carilion's vision to bring advanced care closer to home, eliminating the need to travel out of the area for treatment.

FROM OCT. 1, 2019, TO SEPT. 30, 2024,  
**5,403 INDIVIDUALS, FOUNDATIONS  
AND CORPORATIONS GAVE MORE  
THAN \$77 MILLION TOWARD OUR  
\$100 MILLION GOAL.**

### CAMPAIGN CABINET Honorary Campaign Chairs

The Honorable Steve Agee and Nancy Howell Agee  
Cristina and Zach Agee  
Mary Ann and George Cartledge Jr.  
Ambassador Nicholas F. Taubman and Mrs. Eugenia L. Taubman

Campaign Chair  
Ab Boxley

Campaign Co-Chairs  
Jason Bingham  
Janet Frantz

Cabinet Members  
Eddie Amos  
David Buck, MD  
Nick Conte  
Beverly and Leon Harris  
James Hartley  
Todd Hearp  
Ginny Jarrett\*  
Donna Littlepage  
George Logan  
Mary Ann and Matt Miller  
Joe Moskal, MD  
Garry Norris  
Mark Pace  
Raymond Smoot  
Jon Sweet, MD  
Jim Thompson  
David Wine  
Mike Wise\*

*\*In memoriam*  
**Join Us in This  
Transformative Mission**  
Your support is crucial to bringing this vision to life. Together, we can create a legacy of healing and innovation that will impact generations to come.

For more information, contact  
Ralph Alee, Vice President  
for Philanthropy,  
[rwalee@carilionclinic.org](mailto:rwalee@carilionclinic.org)  
or 540-224-4746

# A PAWS-ON APPROACH

A facility dog named Wali has joined the Carilion Clinic team to support some of the youngest patients at Carilion Children's Tanglewood Center.

Wali is the first dedicated facility dog working in a pediatric healthcare setting in the region. He uses his expertise in specialized tasks and commands to assist with therapy programs, providing targeted support that enhances treatment outcomes while also boosting morale for both patients and staff.

The Roanoke Memorial Hospital Nurse Alumni Association contributed \$10,000 to support Wali's care and wellness. This money will cover the costs of Wali's toys, food, grooming, vet bills and more, ensuring he remains happy, healthy, and ready to provide comfort and support to patients and staff.

Wali comes from Saint Francis Service Dogs, a Roanoke-based nonprofit, that placed him with Carilion Children's at no cost to enhance the patient experience.



## DYNAMIC DUO

Wali works full-time alongside licensed clinical psychologist Tara Mitchell, PhD, who serves as his handler both on and off the clock. Mitchell also completed Saint Francis's structured training program that includes candidate classes, site visits and team training.



## TUNE IN FOR MIRACLES



Two days each year, radio listeners tune in to hear stories of children and families who received support through their medical journeys from the dedicated care teams at Carilion Children's. These heartfelt remembrances are part of the annual radiothons hosted by Wheeler Enterprises radio stations Q99 and 94.9 Star Country, a tradition that spans nearly two decades.

In collaboration with Children's Miracle Network (CMN), all money raised directly supports Carilion's pediatric patients. Last year, Q99's Dick and Dave's Miracle Day Radiothon raised \$148,000 and Star Country Radio's Cure Kids Cancer Radiothon raised \$131,000.

## radiothon



Wheeler Enterprises is just one of the many CMN corporate partners that host events to support Carilion Children's. On Miracle Treat Day, local Dairy Queen franchise owners donate \$1 for every blizzard sold. RE/MAX gave time, money and teddy bears for a Teddy Bear Clinic at Carilion Children's Tanglewood Center to teach kids about medical treatments through hands-on activities. And Speedway and 7-Eleven hosted a national golf tournament with an appearance by a CMN Miracle Family. These are just a few of the amazing things our partners are doing to support children in our community.



Children's Miracle Network program director Macy Ware (left) accepts the award for the highest fundraising in a medium-size market at CMN's 2024 national conference. Carilion Children's is the beneficiary of CMN funding in Southwest Virginia.



## WHY YOUR SUPPORT MATTERS

62%

of pediatric mental health patients come from low-income families whose insurance does not cover the cost of care.

## PEDIATRIC MENTAL HEALTH CARE EXPANDS

Thanks to funding from the Barnhart Endowment and Louise Lester Foundation, our pediatric outpatient behavioral health clinic at Carilion Children's Tanglewood Center grew nearly 40% and added a third therapist in 2024.

Now children who struggle with mental, emotional and behavioral difficulties have improved access to expert diagnosis and treatment so they can function better at home and school.



## LIFE RING SUPPORTS CHILDREN'S CANCER CARE

The Life Ring Foundation hosted its second annual Charlotte's Play Yellow Golf Tournament benefiting the pediatric hematology and oncology clinic within the new Carilion Taubman Cancer Center. The fund-raising event will support their \$2 million pledge to our campaign.

## BETTER TOGETHER

Children's Miracle Network (CMN) partners with businesses and organizations to support fund-raising campaigns for medical care, equipment and therapy programs that save and improve the lives of children in our area.

For more information or to make a gift, visit  
[ChildrensMiracleNetworkHospitals.org](http://ChildrensMiracleNetworkHospitals.org)

**7-Eleven | 7 Brew | Ace Hardware  
Credit Unions for Kids | Dairy Queen  
Great Clips | JOANN | Love's Travel Stop  
Ollie's Bargain Outlet | Panda Express  
RE/MAX | Speedway | Valvoline  
Walmart/Sam's Club**

## GENEROSITY IN ACTION



### JOY ON WHEELS

The Toy Foundation granted Carilion \$8,500 to stock two new mobile play carts filled with toys, games and activities for adolescent patients in the pediatric hematology and oncology clinic and pediatric inpatient floors at Carilion Roanoke Memorial Hospital.



### BAPS GIVES TO CARILION

During Diwali, BAPS Charities Roanoke presented a \$3,705 check to the Carilion Clinic Foundation, proceeds from their downtown walk/run. BAPS Charities is a global organization focused on building better communities.



### KICKS FOR A CAUSE

Shoes 4 Hope united Carilion Children's hematology and oncology patients to paint shoes for Virginia Tech basketball coaches, raising \$5,000 for pediatric care through game-day auctions.



### A LEGACY OF GIVING

The Capital District Kiwanis Foundation presented its annual donation for Carilion Children's. Last year's gift of \$3,000 was the Kiwanians' 32nd in support of Carilion pediatric services.



### COMMUNITIES COME TOGETHER

During the 2024 Give Roanoke and Give Local New River campaigns, donors raised \$7,400 for Carilion Children's pediatric oncology and \$925 for Carilion Hospice, supporting critical patient care and family services.



### SHOWCASING TALENT BUILDING HOPE

Robins & Morton, a national construction firm and contractor for Carilion's Roanoke campus expansion, hosted an employee talent show, raising \$50,000 for the new Carilion Taubman Cancer Center.



### LOVE FROM THE TRACK

Martinsville Speedway donated 40 teddy bears, also known as Speedy Bears, and \$10,000 from the NASCAR Foundation to purchase a new Olympus BX43 microscope for Carilion Children's inpatient hematology and oncology unit.



### DERBY EVENT SUPPORTS CARE

TVC Trust & Wealth Management's Kentucky Derby-themed "Run for the Lilies" party at 202 Social House in Roanoke raised \$600 for breast cancer care at Carilion.

## DONORS

Thank you to our many generous supporters who made donations between October 1, 2023, and December 31, 2024.

### Gifts of \$100,000 and higher

Anonymous  
The Hon. G. Steven and Nancy Howell Agee  
Susan and William Amos  
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Roanoke Gas  
Stateson Homes  
Tazewell Community Foundation  
Valley Star Credit Union Foundation

### Gifts of \$10,000 to \$24,999

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Jeanne and Kerry Armentrout  
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Dr. Christopher and Dr. Hannah Bayne  
Blacksburg Country Club Foundation  
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CMC Organized Medical Staff  
Rob and Karen Cassell  
City of Roanoke  
Nick and Alison Conte  
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Watt Foster Family Foundation  
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Rand and Jan Garrett  
Drs. Mark and Joanne Greenawalt  
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Drs. Robert Trestman and Bonnie Hennig-Trestman  
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Dawn Long  
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M.I. Tech  
Member One Federal Credit Union  
Matthew and Mary Ann Miller

### Gifts of \$5,000 to \$9,999

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Credit Union Miracle Day, Inc.  
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### Gifts of \$2,500 to \$4,999

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Richmond and Sandra Vincent  
Virginia Gastroenterological Society

**Gifts of \$1,000 to \$2,499**

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Taylor and Mandy Adkins  
Cathy and Kevin Akers  
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Carilion Clinic Foundation board member Virginia B. (Ginny) Jarrett died in 2024. She was managing director of investments at Davenports & Co. and co-founder of the Roanoke Women's Foundation. She gave generously to the Carilion Clinic Foundation and many other causes. - In Memoriam



Roanoke businessman and longtime community benefactor Maury Strauss died in 2024 at the age of 99. Strauss donated \$1 million to Carilion in honor of his late wife, Sheila, to support the expansion of Carilion's cancer program. - In Memoriam



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