Nonprofit Profile

Contact Information

Nonprofit
Mercy Health Foundation Oklahoma City

Address
13321 North Meridian, Suite 206
Oklahoma City, OK 73120
Oklahoma County

Phone
(405) 486-8775

Fax
405 936-5790

Website
Mercy.net/practice/mercy-health-foundation-oklahoma-city

Contact Name
Jenne Knudsen

Contact Email
kathleen.seay@mercy.net

Alternate Address
4300 West Memorial Road
Oklahoma City OK 73120

Alternate Phone
405 752-3752

At a Glance

Organization’s type of tax exempt status
Public Supported Charity

Former Names
Mercy Health Center Foundation, Inc.

Supporting Organization
Mercy Hospital Oklahoma City

Year Founded
2000

IRS Ruling Year
2000
Other ways to donate support, or volunteer
Mercy Health Foundation Oklahoma City is a nonprofit philanthropic organization. We rely on financial support from thousands of generous community residents, patients and friends like you. Your donations to Mercy Health Foundation enhance health care for your family, friends, and neighbors in Oklahoma City and surrounding communities—and create a legacy of lasting goodwill.
Mercy Health Foundation accepts donations of cash, checks, and in-kind donations. Monetary donations can be mailed to 4300 West Memorial Road, Oklahoma City, OK 73120. Donations can also be made online at Mercy.net/donate. Please call before dropping off in-kind gifts and arrangements will be made to receive such gifts.
In addition to monetary donations, we also welcome the assistance of volunteers to help us serve central Oklahoma. You may contact the Foundation at (405) 486-8755 for more information on how to volunteer. Thank you for your support!

Statements

Mission
At Mercy, giving back to the communities we serve is central to achieving our mission of bringing compassionate healing to those in need. Mercy Health Foundation Oklahoma City helps Mercy fulfill its mission by supporting and benefiting all of Mercy’s hospitals, clinics, and other medical facilities in the Oklahoma City metropolitan area. We do this by investing in hospital programs that improve community health and provide Oklahoma City residents with the best and most transformative health care experience possible.

Background
Created in 2012, Mercy Health Foundation Oklahoma City is the successor organization to the Mercy Health Center Foundation, which was incorporated on May 1, 2000. The Foundation's purpose is to support Mercy Hospital Oklahoma City and to raise funds for Mercy within the Oklahoma City metropolitan region. Through the Foundation's philanthropic support, Mercy is able to provide the highest quality health care to residents living in Oklahoma City and throughout the state.
As Mercy has expanded its services, facilities, and reach, the Foundation has followed suit. Not only does the Foundation support the hospital, but it also supports the Coletta Building, Community Outreach, the Neurosciences Institute, the Women’s Center, and Mercy Clinic. The Foundation primarily raises funds through major gifts from grateful patients, special events, direct mail solicitations, a robust co-worker campaign, and grants.

Impact
In 2015, Mercy Health Foundation Oklahoma City helped fund over $1 million in hospital projects including those which focus on charity care, enhanced medical services, health education programs, lifesaving medical equipment, and capital improvements. Thanks to support from individuals, organizations, and corporations, the Foundation also raised over $12 million to date for the construction of the Coletta Building, Mercy’s new state-of-the-art breast health and cancer center in Oklahoma City. However, the building construction is only the first step. Mercy is dedicated to making the lives of cancer patients and their families the best they can be. To make this a reality, Mercy Health Foundation is working diligently to strengthen and expand innovative cancer programs that address not only the patient’s physical needs, but also their emotional and spiritual needs. Programs focusing on complementary and holistic therapies, nutrition and wellness, patient navigation, and chemotherapy support are some of the funding priorities for the Foundation in 2016.
Needs
Mercy Health Foundation Oklahoma City has identified the following needs in order to continue providing the residents of Oklahoma City with the highest quality health care available:

1. Increase funding for charity care in order to help more disadvantaged Oklahoma City residents access the care they need.
2. Strengthen cancer support programs focused on complementary therapies, nutrition and wellness, patient navigation, and chemotherapy.
3. Create and implement a fundraising plan to secure philanthropic support for the renovation of the hospital’s OBGYN unit.

CEO/Executive Director Statement
Mercy is a unique health care facility in the Oklahoma City metropolitan area in that we have remained true to our roots. Founded by the Sisters of Mercy, the purpose of the organization has remained consistent with the original ideals of our founders. We provide compassionate care in our everyday service delivery. We find that people believe in our mission and in the vision of the Sisters of Mercy. The foundation they built is incredibly important to all of Mercy’s co-workers. We provide peace and comfort to those who choose Mercy as their health care provider. We have a legacy to build upon - and that is to provide the best health care that we can. Mercy excels in stroke, hospice, and oncology care, and delivers over 3,000 babies per year. Our Emergency Room sees over 56,000 patients per year. We have clinics located throughout the Oklahoma City metropolitan area and our patients can avail themselves with the best physicians, physician assistants, and nurse practitioners in the city. We use technology to serve our patients better through a connected continuum of care. Simply put, Mercy is focused on care and service for the people who reside and work in our community. The Foundation supports Mercy in its mission.

Board Chair Statement
Not only do we strive to carry on Mercy's mission of providing compassionate care and exceptional service to all of our patients, but Mercy has a unique focus of providing care to the poor and underserved within our community. The Foundation assists the hospital in carrying out this special focus. The delivery of quality health care in the United States has become increasingly difficult, burdened by an overwhelmed system of health care providers, insurance companies, government regulations, and consumers—many who cannot afford the high cost of health care. The Mercy Health Foundation is especially sensitive to these realities and supports the hospital in its community outreach efforts and its relentless commitment to assist the poor and underserved in accessing quality health care services in the Oklahoma City metropolitan area.

Area Served

Geographic Area Served

Oklahoma City
Central Oklahoma

The service area of Mercy Hospital Oklahoma City is comprised of six counties (Oklahoma, Canadian, Cleveland, Kingfisher, Lincoln, and Logan) with a population of 1.4 million. Although the primary service area is the Oklahoma City metropolitan area, it is important to note that the hospital accepts patients from across the state.

Service Categories

Primary Organizational Category
Health Care/Fund Raising & Fund Distribution

Secondary Organizational Category
Health Care/Hospitals

Programs
**Mercy Care/Mercy Shield Funds**

**Description**

In 1984, several Mercy physicians began a small fund to help patients who had needs that were not covered by insurance. Over the years, this project has grown. Today, the Mercy Care Fund provides qualifying applicants charitable assistance on a one-time basis for crisis intervention when all other resources have been exhausted. Last year alone, the Mercy Care Fund helped more than 200 individuals. Examples of assistance include:

- Temporary housing for parents of infants in the Neonatal Intensive Care Unit who want to visit their babies, but cannot afford a place to stay.
- Durable medical equipment such as wheelchairs and walkers that allow patients mobility and enable them to live at home.
- Prescription drug assistance.
- Stretcher transportation or other means of transportation for those in need.
- Cab vouchers for patients who do not have transportation home from the hospital.
- Assistance with utility bills, food, and clothing.

In addition, the Mercy Care Fund assists overwhelmed caregivers whose loved ones are in Palliative/Post-Acute Care or Hospice/Respite Care. Mercy covers the costs associated with monitoring patients while the regular caregiver is given a much needed break from caring for such a critically ill patient.

**Category**

Health Care, General/Other Health Care Equipment & Supplies Provision

**Strategy**

**Population Served**

Adults Children and Youth (0 - 19 years) Elderly and/or Disabled

**Program Short-term Success**

Community health care provided in a compassionate and caring way.

**Program Long-term Success**

Improved health outcomes and quality of life for residents of the Oklahoma City metropolitan area, who receive their healthcare at Mercy.

**Program Success Monitoring**

The following program data is tracked: (1) Expenditures, (2) Services funded, (3) Recipients of services. Program goals, expenditures, and outcomes for individuals are tracked through follow-up and interview, in addition to quantitative data used to measure program effectiveness.

**Examples of Program Success**

The nature of the services offered through the Mercy Care Fund are not easily quantifiable. However, we can look at success on a case-by-case basis by listening to our patient's stories and feedback. For example, the Fund may be used to pay for a family's hotel when their loved one comes into town from rural Oklahoma to have surgery, and they are unable to pay for the room out-of-pocket. The Fund may be used to pay a patient's rent who has been ill and unable to work in order to avoid eviction, or cover prescription costs for patients who are unable to afford medication that is vital to their recovery. These seemingly small gestures are very powerful in reducing emotional and financial stress on patients and family members, especially during a time that is already extremely difficult.
Departmental Grant Program

**Description**
Mercy Health Foundation Oklahoma City conducts ongoing fundraising campaigns to support a variety of hospital, clinic, and patient needs. Donors are given the opportunity to contribute to specific programs or to the area of greatest need. The Foundation Board votes to allocate $150,000 of these undesignated funds for departmental grants each fiscal year. Part of the decision-making process of the Grants Committee includes supporting projects that enhance the quality of patient care at Mercy. Departments and clinics have the opportunity to apply for funding items not supported in their general operating budgets as a way to improve the overall patient experience at Mercy.

**Budget**
$150,000.00

**Category**
Health Care, General/Other Health Care Equipment & Supplies Provision

**Strategy**

**Population Served**
Adults Children and Youth (0 - 19 years) Elderly and/or Disabled

**Program Short-term Success**
Improved health outcomes, quality of life, and patient experience for residents of the Oklahoma City metropolitan area, who receive their health care at Mercy.

**Program Long-term Success**
Fulfilling departmental needs outside of the general operating budget that contribute to the quality of patient care.

**Program Success Monitoring**
The following program data is tracked: (1) Expenditures, (2) Equipment/services funded, (3) Department and patient recipients of equipment/services. Program goals, expenditures, and outcomes for individuals are tracked through follow-up with individual departments receiving grant funds from the Foundation, in addition to quantitative data used to measure program effectiveness and how the patient experience was impacted by grant funds.

**Examples of Program Success**
The Foundation's Departmental Grant Program is focused on providing departments with the tools that they need - not just to provide basic health care services, but to provide an enhanced patient experience for those who choose Mercy as their health care provider. For example, the purchase of bariatric wheelchairs and scales will ensure that all patients, regardless of weight, are adequately cared for and treated with dignity simply by possessing additional equipment that may be deemed unnecessary in many other health care settings. Another example is the recent purchase of sky lights for patients receiving chemotherapy in the Oncology Center. By installing the skylights, patients are now able to look up to the sky instead of the ceiling during treatment, which requires them to lay on their backs for several hours. Having something beautiful and interesting to look at provides the patient with a peaceful and calm environment which helps reduce stress and anxiety.

**Disaster Programs**

<table>
<thead>
<tr>
<th>Voluntary Organizations Active in Disaster (VOAD)</th>
<th>No</th>
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</thead>
</table>

**Comments on Programs**

CEO/Executive Director/Board Comments
A primary challenge for the Foundation is expanding its funding base to support the Oklahoma City hospital, the network of clinics located in the metropolitan area, and the slew of new programs which come along with the recent opening of the Coletta Building, Mercy’s breast health and cancer center. Mercy Health Foundation is working diligently to secure the philanthropic support necessary for these programs to thrive.

Staff & Management

CEO/Executive Director  
Kay Oliver

Start Date  
Jan 2000

Email  
helen.oliver@mercy.net

CEO/Executive Director Experience
Kay Oliver has served Mercy Hospital and Mercy Health Foundation in a variety of capacities over the last three decades. She has served as the Executive Director of Mercy Health Foundation Oklahoma City since 2000 and has raised over $50 million for Mercy, its patients, and to help low-income Oklahoma City residents pay for their health care.

Staff Information

Number of Full-time Staff  
7

Number of Part-time Staff  
0

Number of Contract Staff  
0

Number of Volunteers  
50

Staff Retention Rate  
83 %

Are professional development opportunities provided?  
Yes

Does CEO/Executive Director have formal evaluations?  
Yes

Management Reports to Board?  
Yes

Organizational Plans

Fundraising Plan  
Under Development

Policy against commission-based compensation for fundraising consultant  
Yes

Communication Plan  
Under Development

Strategic Plan  
Under Development

Number of Years Strategic Plan Considers  
N/A

Management Succession Plan  
Under Development

Organization Policies and Procedures  
Under Development

Continuity of Operations Plan  
No

Policies
Nondiscrimination Policy  
Under Development

Whistle Blower Policy  
No

Document Destruction Policy  
No

Directors and Officers Insurance Policy  
No

Collaborations

Mercy Hospital, Mercy Clinic Network, Mercy Health Foundation of Oklahoma, Mercy Foundation Ardmore, Mercy Foundation Ada, Cooperative Central Pharmacy, Health Alliance for the Uninsured.

Government Licenses

Is your organization licensed by the government (federal, state and/or local)?  
No

Governance

Board Chair  
Mr. Kyle Sweet

Company Affiliation  
Partner/Owner, Sweet Law Firm

Term  
July 2017 to June 2018

Email  
kyle@sweetlawfirm.com

Board of Directors

List Current as of  
July 01, 2017
<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
<th>Status</th>
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<tbody>
<tr>
<td>Mr. Jess Armor M.D.</td>
<td>Mercy</td>
<td>Voting</td>
</tr>
<tr>
<td>Ms. Louise Bennett</td>
<td></td>
<td>Voting</td>
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<tr>
<td>Mollie Bennett McCurdy</td>
<td></td>
<td>Voting</td>
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<tr>
<td>Mr. Terry Bradley</td>
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<td>Voting</td>
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<tr>
<td>Mr. Steve Brown</td>
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<td>Voting</td>
</tr>
<tr>
<td>Mr. Dillon Curran</td>
<td></td>
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<tr>
<td>Ms. Nicole Dell’Osso</td>
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<td>Voting</td>
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<tr>
<td>Ms. Nicole D. Dobbins Blad</td>
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<tr>
<td>Ms. Susan Drake</td>
<td></td>
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<tr>
<td>Mr. Steve Esco</td>
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<td>Voting</td>
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<tr>
<td>Mr. Bruce Fraley</td>
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<tr>
<td>Ms. Chele Gatewood</td>
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<tr>
<td>Jim Gebhart</td>
<td></td>
<td>Exofficio</td>
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<tr>
<td>Jim Green</td>
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<tr>
<td>Ms. Jill Greene</td>
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<tr>
<td>Mr. James Hartsuck M.D.</td>
<td></td>
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<tr>
<td>Ms. Brittney Keating</td>
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<tr>
<td>Mr. Mike Krenger</td>
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<tr>
<td>Ms. Whitney McClendon</td>
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<tr>
<td>Mr. Cameron McLain</td>
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<tr>
<td>Ms. Suzy Merritt</td>
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<tr>
<td>Annie Middlebrooks</td>
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<tr>
<td>Sr. Rose Elizabeth Power RSM</td>
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<tr>
<td>Ms. Patty Ruffin</td>
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<tr>
<td>Mr. Robert S. Samis</td>
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<tr>
<td>Kimber Shoop</td>
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<td>Mr. David Sine</td>
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<td>Ms. Di Smalley</td>
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<td>Jean Smith</td>
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<td>Ms. LaRue A. Stoller</td>
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<tr>
<td>Ms. Rebecca Stough M.D.</td>
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<tr>
<td>Mr. Joe Strunk</td>
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<tr>
<td>Mr. Kyle Sweet</td>
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<tr>
<td>Tallie Valentine</td>
<td></td>
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Governance Information

<table>
<thead>
<tr>
<th>Board Term Lengths</th>
<th>3 years</th>
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<tbody>
<tr>
<td>Board Term Limits</td>
<td>2 terms</td>
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<tr>
<td>Number of Full Board Meetings Annually</td>
<td>4</td>
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<tr>
<td>Board Meeting Attendance %</td>
<td>60 %</td>
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</table>
Percentage of Board Making Monetary Contributions to the Organization 95 %

Percentage of Board Making In-Kind Contributions to the Organization 0 %

Board Orientation Yes

Constituency Includes Client Representation Yes

Written Board Selection Criteria? Under Development

Written Conflict of Interest Policy? Under Development

Standing Committees

Board Governance
Finance
Special Events (Golf Tournament, Walk / Run, Silent Auction, Dinner / Gala)
Distributions / Grant Making

Financials

Current Fiscal Year
July 01, 2017–June 30, 2018

Current Year Budgeted Total Income $3,075,000
Current Year Budgeted Total Expenses $3,020,121

Prior Three Years' Financial History

<table>
<thead>
<tr>
<th>Income and Expenses</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
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</thead>
<tbody>
<tr>
<td>Fiscal Year</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Revenue</td>
<td>$3,009,061</td>
<td>$8,984,903</td>
<td>$3,046,486</td>
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<tr>
<td>Total Expenses</td>
<td>$1,956,799</td>
<td>$2,561,543</td>
<td>$1,135,008</td>
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<tr>
<td>Revenue Less Expenses</td>
<td>$1,052,262</td>
<td>$6,423,360</td>
<td>$1,911,478</td>
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Income Sources
<table>
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<th>Fiscal Year</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
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</thead>
<tbody>
<tr>
<td>Contributions</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Foundation and Corporation Contributions</td>
<td>$2,735,383</td>
<td>$7,902,758</td>
<td>$2,038,115</td>
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<tr>
<td>Government Contributions</td>
<td>$0</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Federal</td>
<td>--</td>
<td>--</td>
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</tr>
<tr>
<td>State</td>
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<td>--</td>
</tr>
<tr>
<td>Local</td>
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<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Unspecified</td>
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<tr>
<td>Individual Contributions</td>
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</tr>
<tr>
<td>Indirect Public Support</td>
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<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Earned Revenue</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Investment Income, Net of Losses</td>
<td>$4,777</td>
<td>$8,130</td>
<td>$3,363</td>
</tr>
<tr>
<td>Unrealized Gain/Loss</td>
<td>$13,365</td>
<td>$593,965</td>
<td>$419,236</td>
</tr>
<tr>
<td>Membership Dues</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
<tr>
<td>Special Events</td>
<td>$256,241</td>
<td>--</td>
<td>$57,492</td>
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<tr>
<td>Revenue In-Kind</td>
<td>--</td>
<td>$480,050</td>
<td>$528,280</td>
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<tr>
<td>Other</td>
<td>($705)</td>
<td>--</td>
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### Expense Allocation

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
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</thead>
<tbody>
<tr>
<td>Program Expense</td>
<td>$1,334,790</td>
<td>$1,484,688</td>
<td>$456,543</td>
</tr>
<tr>
<td>Administration Expense</td>
<td>$361,309</td>
<td>$921,528</td>
<td>$597,333</td>
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<tr>
<td>Fundraising Expense</td>
<td>$260,700</td>
<td>$155,327</td>
<td>$81,132</td>
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<tr>
<td>Payments to Affiliates</td>
<td>--</td>
<td>--</td>
<td>--</td>
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<tr>
<td>Total Revenue/Total Expenses</td>
<td>1.54</td>
<td>3.51</td>
<td>2.68</td>
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<tr>
<td>Program Expense/Total Expenses</td>
<td>68%</td>
<td>58%</td>
<td>40%</td>
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<tr>
<td>Fundraising Expense/Contributed Revenue</td>
<td>9%</td>
<td>2%</td>
<td>4%</td>
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### Assets and Liabilities

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<thead>
<tr>
<th>Fiscal Year</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Assets</td>
<td>$1,956,799</td>
<td>$15,930,776</td>
<td>$9,323,730</td>
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<tr>
<td>Current Assets</td>
<td>$501,709</td>
<td>$4,542,752</td>
<td>$4,203,793</td>
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<tr>
<td>Long-Term Liabilities</td>
<td>--</td>
<td>$306,658</td>
<td>$109,004</td>
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<tr>
<td>Current Liabilities</td>
<td>$120,282</td>
<td>$6,800</td>
<td>$20,768</td>
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<tr>
<td>Total Net Assets</td>
<td>$16,669,580</td>
<td>$15,617,318</td>
<td>$9,193,958</td>
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### Short-term Solvency

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<thead>
<tr>
<th>Fiscal Year</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Ratio: Current Assets/Current Liabilities</td>
<td>4.17</td>
<td>668.05</td>
<td>202.42</td>
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</table>

### Long-term Solvency

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<thead>
<tr>
<th>Fiscal Year</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-Term Liabilities/Total Assets</td>
<td>0%</td>
<td>2%</td>
<td>1%</td>
</tr>
</tbody>
</table>

### Top Funding Sources
<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>2015</th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Top Funding Source &amp; Dollar Amount</strong></td>
<td>Foundations &amp; Corporations $2,735,383</td>
<td>Foundation &amp; Corporations $7,902,758</td>
<td>Foundations &amp; Corporations $2,038,115</td>
</tr>
<tr>
<td><strong>Second Highest Funding Source &amp; Dollar Amount</strong></td>
<td>Special Events $256,241</td>
<td>Realized &amp; Unrealized $593,965</td>
<td>Revenue In-Kind $528,280</td>
</tr>
<tr>
<td><strong>Third Highest Funding Source &amp; Dollar Amount</strong></td>
<td>Realized &amp; Unrealized Gains/(Losses) $13,365</td>
<td>Revenue In Kind $480,050</td>
<td>Realized &amp; Unrealized $419,236</td>
</tr>
</tbody>
</table>

Endowment and Other Financial Information

- **Endowment?** Yes
- **Endowment Value** $254,033.00
- **Endowment Spending Policy** Percentage
- **Endowment Spending Policy Percentage (if selected)** 5%
- **Credit line?** No
- **Reserve fund?** Yes
- **Tax Credits?** No

Capital Campaign

- **Currently in a Capital Campaign?** No
- **Campaign Dates** Apr 0 to June 0
- **Capital Campaign Anticipated in Next 5 Years?** No

Comments on Financials

**Foundation Staff Comments**
Prior year financial information is from IRS Form 990 for FY2015, then from their audited financial statements for FY2014 & FY2013. Please note, as of FY2015, Mercy Health Foundation Oklahoma City discontinued financial audits. Even though Mercy Health Foundation Oklahoma City is a subsidiary of Mercy Health the Mercy audited financials does not include Mercy Health Foundation Oklahoma City on page 8.

Special Events/Fundraising and Revenue in-kind amounts are taken from the IRS Tax Form 990.

An extension has been filed for the 2015 form 990 and will be completed early May 2017.

Organizations with a GiveSmartOKC profile are responsible for updating information annually within 45 days following the end of their fiscal year.