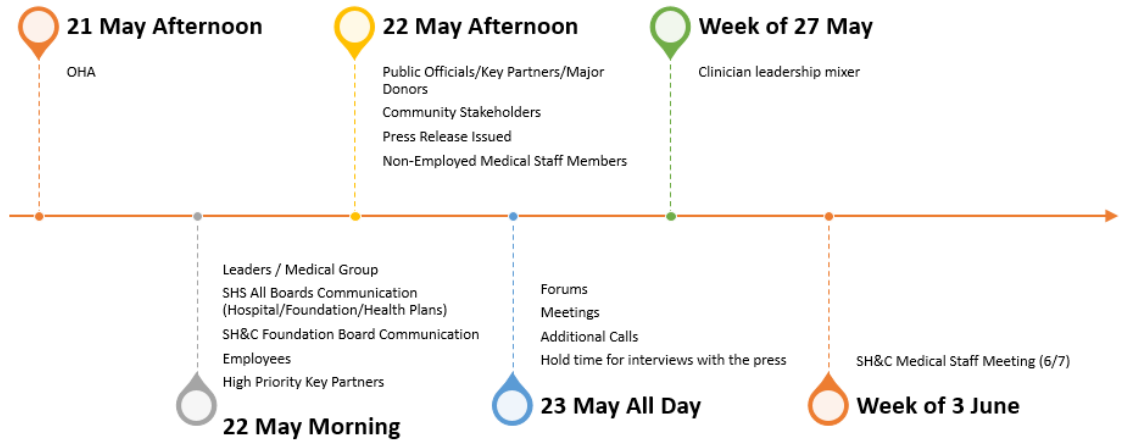


3. Response 6.c of Appendix A states that the entities “have communicated extensively with key stakeholders including community members and employees throughout this process...” Please provide the following:
 - a. The dates, number of, and location of all meetings, forums, blog posts, newsletters, and town hall meetings.
 - b. The number and classification of employees and contractors who attended this outreach (estimates are permissible).
 - c. The number of community members who attended the three town hall meetings (estimates are permissible).
 - d. Copies of presentations, slides, handouts, newsletters, blog posts, or other written materials that were shared at these meetings.
 - e. Copies of all written feedback, and a summary of all verbal feedback, you received during this outreach.

Santiam’s response:

The image below illustrates the joint initial announcement plan with stakeholders:

Announcement Planned Sequence of Events



On May 22nd at 7:30AM, at Santiam Hospital, an in-person announcement was made to our Medical Staff and Leadership, and almost all came in attendance. Next came the virtual All Staff Forum. Over 250 staff members were logged in, listening closely. We followed up quickly with an all-staff email announcement of the affiliation

pursuit, staff FAQs, a link to a staff survey, as well as our press release; this information was also posted on our internal website, The Pulse.

Maggie Hudson, President & CEO spent the remainder of the morning of May 22nd calling our key partners, including Salem Health, St. Charles, Marion County Commissioners, Foundation Board members and large donors.

A press release was submitted to media and subsequently, an email announcement with press release was issued to the Auxiliary, Chaplains, IHO partners, local government representatives and other key stakeholders.

Posts were issued on all of our social media platforms and a banner on our website directed visitors to a landing page shared with Samaritan. The page features the press release as well as public FAQs that will be periodically updated.

Follow up meetings were held with every hospital department and clinic between May 22nd and June 11th.

Townhalls with the communities we serve were held on June 18th, 26th and 27th.

Monthly updates continue to be communicated to Department Directors, All Staff and Medical Staff.

Samaritan's Response:

There is no written feedback that was obtained from communications with key stakeholders. Verbal feedback has been overwhelmingly positive. Samaritan stakeholders are excited to grow our market share and welcome another hospital and clinics into our system.

A recurring question is if we are purchasing Santiam and, given our current financial challenges, if now is the best time for such a purchase. We have corrected the misassumption that this is a purchase by Samaritan of Santiam and reaffirmed that this is an affiliation of two great organizations which is key to Samaritan's growth strategy and Santiam's stability.

While it will take years to fully integrate, we believe this affiliation will help both organizations achieve our missions and become more financially stable to face the challenges of health care delivery into the future.

Date	Audience	Partner	Topic	Leader	Call/Email
5/22/2024	Cheryl Nestor-Wolf	Salem Health CEO	Pursuit Announcement	Maggie Hudson	Call
	Steve Gordon	St. Charles CEO	Pursuit Announcement	Maggie Hudson	Call
	Brian Moore	Bay Area Hospital	Pursuit Announcement	Maggie Hudson	Call
	Dorcas Saffly	OHSU	Pursuit Announcement	Steve Vets	Call
		USDA	Pursuit Announcement	Steve Vets	Call
	Peter Davidson		Pursuit Announcement	Maggie Hudson	Call
		EMS Agencies	Pursuit Announcement	Steve Vets	Call
		WVP	Pursuit Announcement	Chris Grinstead	Call
		Auxillary	Pursuit Announcement	Maggie Hudson	Email
		Chaplain	Pursuit Announcement	Maggie Hudson	Email
	Maria Fife	Canyon Health	Pursuit Announcement	Steve Vets	Call
	Casey Lulay	Santiam Mobile Health	Pursuit Announcement	Steve Vets	Call
	Scot Campbell	PT NW	Pursuit Announcement	Maggie Hudson	Email
		Oncology	Pursuit Announcement	Maggie Hudson	Email
		SCTC	Pursuit Announcement	Maggie Hudson	Email
	Corey Lohman	Emerick	Pursuit Announcement	Maggie Hudson	Email
	Jeremy Kuenzi	Kaufman Construction	Pursuit Announcement	Maggie Hudson	Email
	Ken Pasley		Pursuit Announcement	Maggie Hudson	Email
	Doris	OMAC	Pursuit Announcement	Maggie Hudson	Call
		DUO	Pursuit Announcement	Maggie Hudson	Email
	Brian Quigley	City of Stayton	Pursuit Announcement	Maggie Hudson	Email
	Angelica Ceja	City of Aumsville	Pursuit Announcement	Maggie Hudson	Email
	Tim Kirsch	City of Mill City	Pursuit Announcement	Maggie Hudson	Email
	Debbie Nuber	City of Scio	Pursuit Announcement	Maggie Hudson	Email
	Steve Horning	City of Turner	Pursuit Announcement	Maggie Hudson	Email
	Ron Evans	City of Gates	Pursuit Announcement	Maggie Hudson	Email
	Llyod Valentine	City of Lyons	Pursuit Announcement	Maggie Hudson	Email
		City of Idanha	Pursuit Announcement	Maggie Hudson	Email
	Jan Fritz, Danielle Bethell, Ke	Marion County Commissioners	Pursuit Announcement	Maggie Hudson	Call
	Tucker, Nyquist	Linn County Commissioners	Pursuit Announcement	Maggie Hudson	Email
		Governor's Office	Pursuit Announcement	Maggie Hudson	Email
	Tyler & Deana Freres	Donors	Pursuit Announcement	Maggie Hudson	Call
	Kyle & Trish Freres	Donors	Pursuit Announcement	Maggie Hudson	Call
	Diane Freres	Donors	Pursuit Announcement	Maggie Hudson	Call
	Rob Freres	Donors	Pursuit Announcement	Maggie Hudson	Call
	Jim Frank	Donors	Pursuit Announcement	Maggie Hudson	Call
	Carol Carey	Donors	Pursuit Announcement	Maggie Hudson	Call
	Denny Frank	Donors	Pursuit Announcement	Maggie Hudson	Call
	Brenden Foundation	Donors	Pursuit Announcement	Maggie Hudson	Call
	Dick Withnell	Donors	Pursuit Announcement	Maggie Hudson	Call
	Julie Boschler	Donors	Pursuit Announcement	Maggie Hudson	Call
		Santiam Canyon Wildlife Relief Fund Advisory Committee	Pursuit Announcement	Melissa Baurer	Email
		Santiam Service Integration Key Leaders/Supporters	Pursuit Announcement	Melissa Baurer	Email
		Santiam Service Integration Team Members	Pursuit Announcement	Melissa Baurer	Email

		Santiam Canyon Long-Term Recovery Executive Team	Pursuit Announcement	Melissa Baurer	Email
		Oregon Resiliency Emergency Management	Pursuit Announcement	Melissa Baurer	Email
		Oregon Housing and Community Services	Pursuit Announcement	Melissa Baurer	Email
		Oregon Community Foundation	Pursuit Announcement	Melissa Baurer	Email
		CHIP executive Committee	Pursuit Announcement	Melissa Baurer	Email
	Justin Hopkins	Willamette Health Council	Pursuit Announcement	Maggie Hudson	Call
	Paul Logan	NW Human Services	Pursuit Announcement	Maggie Hudson	Email
	Ramona Mitchell	HUD	Pursuit Announcement	Maggie Hudson	Call
	Ernesto	Key Bank	Pursuit Announcement	Maggie Hudson	Email
	Tony Andrade	Moss Adams	Pursuit Announcement	Maggie Hudson	Email
	Jennifer Paul	Saalfeld Griggs	Pursuit Announcement	Maggie Hudson	Email
	Lisa Mensah	OCF	Pursuit Announcement	Maggie Hudson	Email
	Ron	Millwood	Pursuit Announcement	Maggie Hudson	Call
	Jessica Howard	Chemeketa Community College	Pursuit Announcement	Maggie Hudson	Email
	Sarah Comstock	Corban University	Pursuit Announcement	Maggie Hudson	Email
	Mike Morrison	Keudell	Pursuit Announcement	Maggie Hudson	Email
	Todd Gescher	True PWA	Pursuit Announcement	Maggie Hudson	Email

Auxiliary	SH&C	Pursuit Announcement	Maggie Hudson	Email
Chaplains	SH&C	Pursuit Announcement	Maggie Hudson	Email
Foundation Board	SH&C	Pursuit Announcement	Maggie Hudson	Email
	Oregon Health Authority	Pursuit Announcement	Maggie Hudson/Doug Boysen	Call

From: [Maggie Hudson](#)
To: [Forward Together](#)
Bcc: [SMH Staff](#)
Subject: Santiam Hospital & Clinics and Samaritan Health System Announce Affiliation Pursuit
Date: Wednesday, May 22, 2024 8:22:00 AM
Attachments: [image001.png](#)
[PRESS RELEASE.pdf](#)
[STAFF FAQ.pdf](#)



Dear Valued Medical, Hospital & Clinic Staff,

It is with enthusiasm and optimism I share with you the anticipated new path forward for Santiam Hospital & Clinics. By unanimous Board support, it is our intent to affiliate with Samaritan Health Services, a local, non-profit healthcare delivery system. Together, we have signed a non-binding Letter of Intent (LOI) allowing us to further explore this affiliation. The anticipated outcome is for Santiam Hospital & Clinics to become a part of Samaritan Health Services.

In honoring our community founders, we remain committed to local governance, local leadership, and provider-driven clinical quality. Through thoughtful and thorough assessment, it is clear Samaritan Health Services is built upon these same guiding principles and is the right partner for us. Their mission, vision, values and culture directly align with those of Santiam Hospital & Clinics.

Together, we can do more good – for our patients, our communities and our staff. This potential affiliation is a strategic shift to secure a better future for the patients served by Santiam Hospital & Clinics. We are committed to ensuring a better future for you, our valued staff. We want to remain a strong employer offering competitive wages and benefits and be able to grow the resources necessary to care for our patients safely and effectively into the future.

As part of the assessment, I invite your feedback. I welcome your ideas on how you think we can ensure this transition goes well. Please provide input into this survey to help us better understand your needs and how best to communicate with you: [STAFF PULSE CHECK](#)

Please join me in celebrating this exciting potential partnership with Samaritan Health

Services. It is our commitment to strengthen this long-lasting health care system to serve the residents of the Santiam Canyon, not just for today, but for decades to come. This is our new path. I couldn't be more proud of us, our Santiam Hospital & Clinics family. I hope you join me with enthusiasm as we welcome our new partner, and as we work to become part of a bigger family, Samaritan Health Services.

Thank you for entrusting me as your leader on this new path. As you know, my door is always open, please walk in.

In gratitude,

Maggie

Maggie Hudson, MBA

President & CEO

Santiam Hospital & Clinics

(503) 769-9236 | mhudson@santiamhospital.org

<https://santiamhospital.org/>

<https://www.facebook.com/SantiamHospitalOregon/>



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From: [Maggie Hudson](#)
To: [Maggie Hudson](#)
Bcc:

Subject: Santiam Hospital & Clinics and Samaritan Health System Announce Affiliation Pursuit
Date: Wednesday, May 22, 2024 10:56:00 AM
Attachments: [image001.png](#)
[image002.png](#)
[Press Release_Samaritan-Santiam-Affiliation_5-22-24_final.pdf](#)



Dear Valued Partners,

It is with enthusiasm and optimism I share with you the anticipated new path forward for Santiam Hospital & Clinics. With unanimous Board support, it is our intent to affiliate with Samaritan Health Services, a local, non-profit healthcare delivery system. Together, we have signed a non-binding Letter of Intent (LOI) allowing us to further explore this affiliation. The anticipated outcome is for Santiam Hospital & Clinics to become a part of Samaritan Health Services.

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Together, we can do more good – for our patients, our communities and our staff.

This potential affiliation is a strategic shift to secure a better future for the patients served by Santiam Hospital & Clinics. It is our commitment to strengthen this long-lasting health care system to be here to serve the residents of the Santiam Canyon, not just for today or tomorrow, but for decades to come.

Please join me with enthusiasm as we welcome our new partner, and as we work to become part of a bigger family, Samaritan Health Services. I welcome your input. As you know, *my door is always open, please walk in.*

Thank you for your continued support of Santiam Hospital & Clinics.

In gratitude,

Maggie

Maggie Hudson, MBA

President & CEO

Santiam Hospital & Clinics

(503) 769-9236 | mhudson@santiamhospital.org

<https://santiamhospital.org/>

<https://www.facebook.com/SantiamHospitalOregon/>



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Date	Time	Meeting Title	Audience	Attendees	Location/Virtual	Powerpoint	FAQ Handouts
Wednesday, May 22, 2024	7:30 AM	Hospital Update	Medical Staff & Leadership	90	Auditorium	x	
Wednesday, May 22, 2024	8:00 AM	All Staff Forum	All Santiam Staff	250	Virtual	x	
Wednesday, May 22, 2024	11:00 AM	HR Follow UP	HR Staff	6	Maggie's Office		
Wednesday, May 22, 2024	5:30 PM	Ambulance Meeting	EMS Team	12	Conference Room		
Thursday, May 23, 2024	10:30 AM	Lab Follow Up	Lab Staff	12	Conference Room		
Thursday, May 23, 2024	1:00 PM	Materials Management Follow Up	Materials Management Staff	5	Conference Room		
Thursday, May 23, 2024	1:30 PM	Patient Access	PAR Team	10	Conference Room		
Thursday, May 23, 2024	2:00 PM	Dietary Update	Dietary Staff	12	Cafeteria		
Thursday, May 23, 2024	2:30 PM	Imaging Update	Diagnostic Imaging Staff	12	Auditorium		
Thursday, May 23, 2024	3:00 PM	Fiscal Services	Accounting Team	5	Conference Room		
Thursday, May 23, 2024	4:00 PM	Surgery	Surgery Team	20	Surgery Break Room		
Thursday, May 23, 2024	5:00 PM	Nursing Update	RNs, LPNs, CNAs	20	Virtual		
Friday, May 24, 2024	7:30 AM	Follow Up Meeting for Medical staff	Clinicians/GMC	30	Auditorium		
Friday, May 24, 2024	11:00 AM	Revenue Cycle	Revenue Cycle Team	30	Siegmund		
Friday, May 24, 2024	12:00 PM	IHO	IHO Team	10	Sublimity Santiam Center		
Friday, May 24, 2024	1:00 PM	Clinic Managers	Clinic Managers	12	Conference Room		
Tuesday, May 28, 2024	10:00 AM	Department Directors	Leadership				
Wednesday, May 29, 2024	9:30 AM	Facilities	Facilities Team	5	Conference Room		
Wednesday, May 29, 2024	2:30 PM	IT	IT Team	8	Conference Room		
Thursday, May 30, 2024	2:30 PM	Pharmacy	Pharmacy Team	12	Pharmacy		
Thursday, June 6, 2024	12:15 PM	All Staff Forum	All Santiam Staff	166	Virtual		
Friday, June 7, 2024	7:30 AM	MEC	Medical Executive Committee	10	Conference Room		
Friday, June 7, 2024	8:00 AM	GMC	Clinicians/GMC	40	Auditorium	x	
Tuesday, June 11, 2024	12:00 PM	Follow up with SWIC	SWIC staff	8	SWIC office		
Tuesday, June 11, 2024	12:30 PM	Follow up with RT	RT Staff	8	RT Office		
Tuesday, June 18, 2024	6:00 PM	Town Hall	Community Members	60	Auditorium		x
Wednesday, June 19, 2024	5:30 PM	Mixer	SMG & Santiam Medical Staff				
Wednesday, June 19, 2024	5:30 PM	Mixer	Medical Staff & Leadership	50	Coria Estates		
Wednesday, June 26, 2024	6:00 PM	Town Hall	Community Members	8	Turner Fire Hall	x	x
Thursday, June 27, 2024	6:00 PM	Town Hall	Community Members	8	Mill City	x	x
Thursday, May 23, 2024	9:00 AM	Senator Girod		3	Conference Room		
Thursday, May 23, 2024	11:00 AM	Foundation Board	SHC Foundation Board Members	8	Virtual		
Friday, May 24, 2024	10:00 AM	Nurse Managers	Nursing Leadership	9	Sherri's Office		
Thursday, May 30, 2024	12:00 PM	SIMC/CMC	Clinic Staff	15	Suite 200		
Wednesday, June 26, 2024	12:00 PM	SMA	Clinic Staff	15	Suite 100		
Tuesday, June 11, 2024	4:00 PM	Stayton/SublimityCity Council	City Council Members	6	Conference Room		
Thursday, June 20, 2024	8:00 AM	Salem/SHS/SHC	CEOs	3	Sassy Onion		
Friday, June 28, 2024	8:00 AM	Willamette Health Council		2	Archive		
Thursday, August 15, 2024	11:00 AM	HUD	Ramona, Rachael	3	Virtual		
Monthly Updates		Department Directors					
Monthly Updates		All staff Forum				x	
Monthly Updates		GMC/MEC				x	



#ForwardTogether



“Building a long-lasting healthcare system for decades to come.”



Why Partner?



Why Now?



Why Samaritan?

STRATEGIC PRIORITIES



CULTURE COMPASS





“Building a long-lasting healthcare system for decades to come.”



Why Partner?



Why Now?



Why Samaritan?

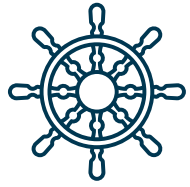


What's Next?

Planning for the Next ~50 Days



WHAT TO EXPECT IN THE NEXT TWO WEEKS?



Your Input is Invaluable



Department Meetings



Survey & All Staff Forum 6/6



#ForwardTogether





ALL STAFF FORUM

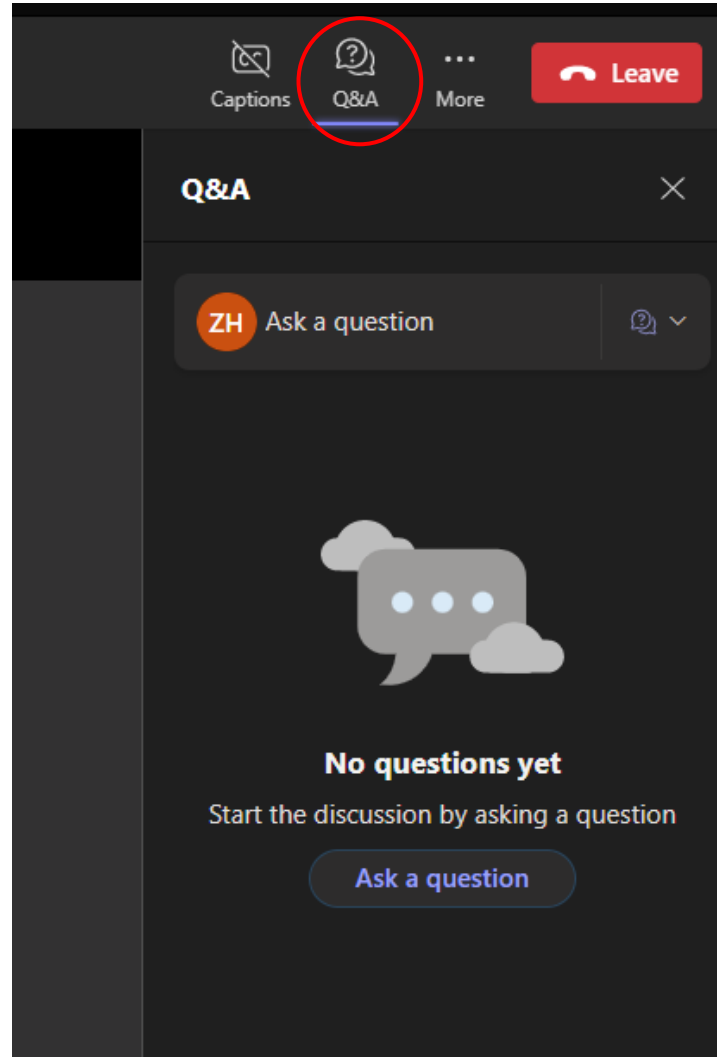
June 6th, 2024

12:15 – 12:45 PM

#ForwardTogether

WE WANT TO HEAR FROM YOU

Please utilize the Q&A (not the chat) section for any questions or comments.



WHAT HAS HAPPENED SINCE OUR LAST FORUM?

We have met with most of you!

✓ Medical Staff

✓ Revenue Cycle

✓ Fiscal Services

✓ EMS

✓ Human Resources

✓ Facilities

✓ Dietary

✓ Laboratory

✓ Pharmacy

✓ Materials Management

✓ Nursing

✓ Surgery

✓ IT

✓ Cardiology Clinic

✓ Patient Access

✓ Imaging

✓ IHO

✓ Cascade Medical Clinic

✓ Santiam Medical Clinic

✓ Internal & Pulmonary
Medicine Clinic

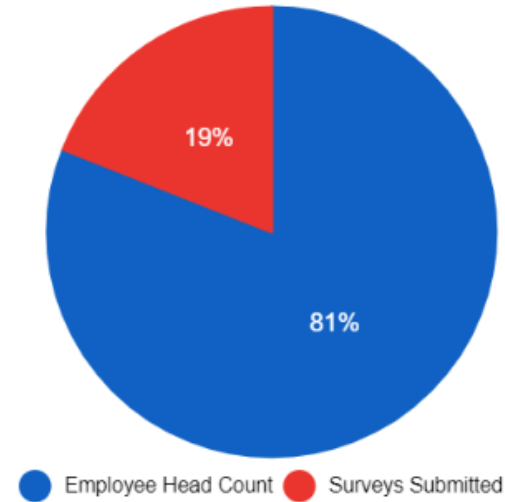
✓ Clinic Managers

WE HEAR YOU!

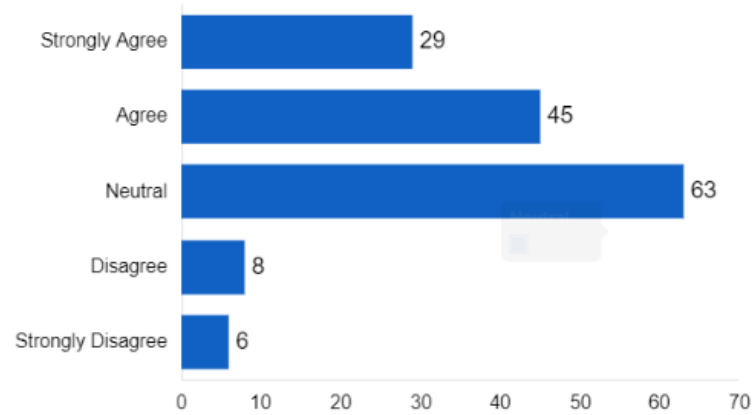
153
Surveys Submitted

97
Comments Made

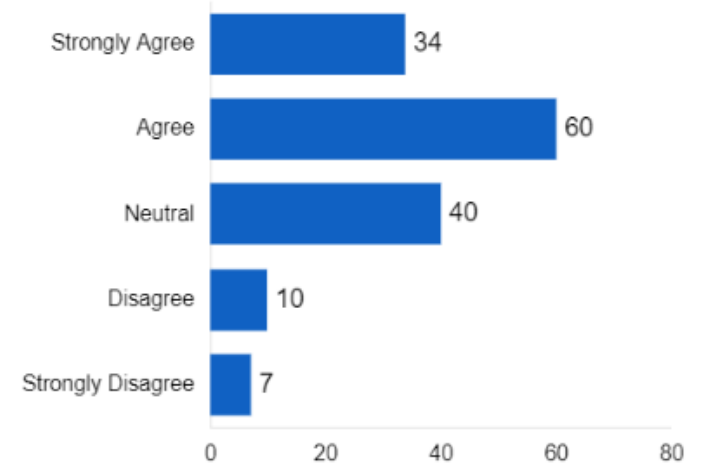
Surveys Submitted vs Company Head Count



Overall Impression of Affiliation



Vision of the future



I support our future with Samaritan Health with only positive thoughts going forward!

THANK YOU FOR YOUR FEEDBACK!

I understand it is probably inevitable for the future of the Hospital which is a vital part of this community. Always a shock to come to something new that feels pretty big.

I am optimistic that this will improve our business practices and do away with old habit's that have not been beneficial in the past.

I am excited for this new venture :-)

I'm nervous, anxious, curious. A lot of feelings! Sad

As with any change, sometimes it's a little scare! I support any positive changes for Santiam! Love my job! Love being able to be seen as a patient in our community! Go Santiam!

I am nervous for what this means for our department, but excited for the future and the possibilities they hold.

Working here for 19 years, Santiam is all about Embracing and moving forward. I have my trust with Maggie's Leadership Team

Santiam Hospital & Clinics Powered by Samaritan Health. Embrace Your Health!

I'm nervous on how much changes will happen.

Appreciate the direction we are headed and the opportunity for staff voices to be heard along the way and taken into consideration as the process progresses.

I hope we can still feel like our voice matters to the people at the top

Please keep our Santiam name if possible.

I am excited for the support that a larger organization may bring!

*FREQUENTLY
ASKED
QUESTIONS
UPDATED*

- Will Santiam Hospital & Clinics adopt the pay schedule of Samaritan Health Services, and will seniority be transferred?
- Will Santiam Hospital & Clinics current health insurance, Consociates change to Samaritan's Health Insurance Plan?
- Will Santiam Hospital & Clinics employees continue to have a twenty percent discount from hospital and clinic bills if Santiam chooses to affiliate with Samaritan Health Services?
- Will Santiam Hospital & Clinics employees continue to be able to use the on-site pharmacy?
- When will staff of Santiam Hospital & Clinics be trained on the Samaritan Epic?
- Will the Foundation's Dodgeball Tournament still be held?
- What will be our name? Will we keep our logo?

LET'S KEEP IN TOUCH!



Bi-weekly Update on The Pulse

Ways to Engage

18

Teams Forum

10

In-Person Forums

32

Email

2

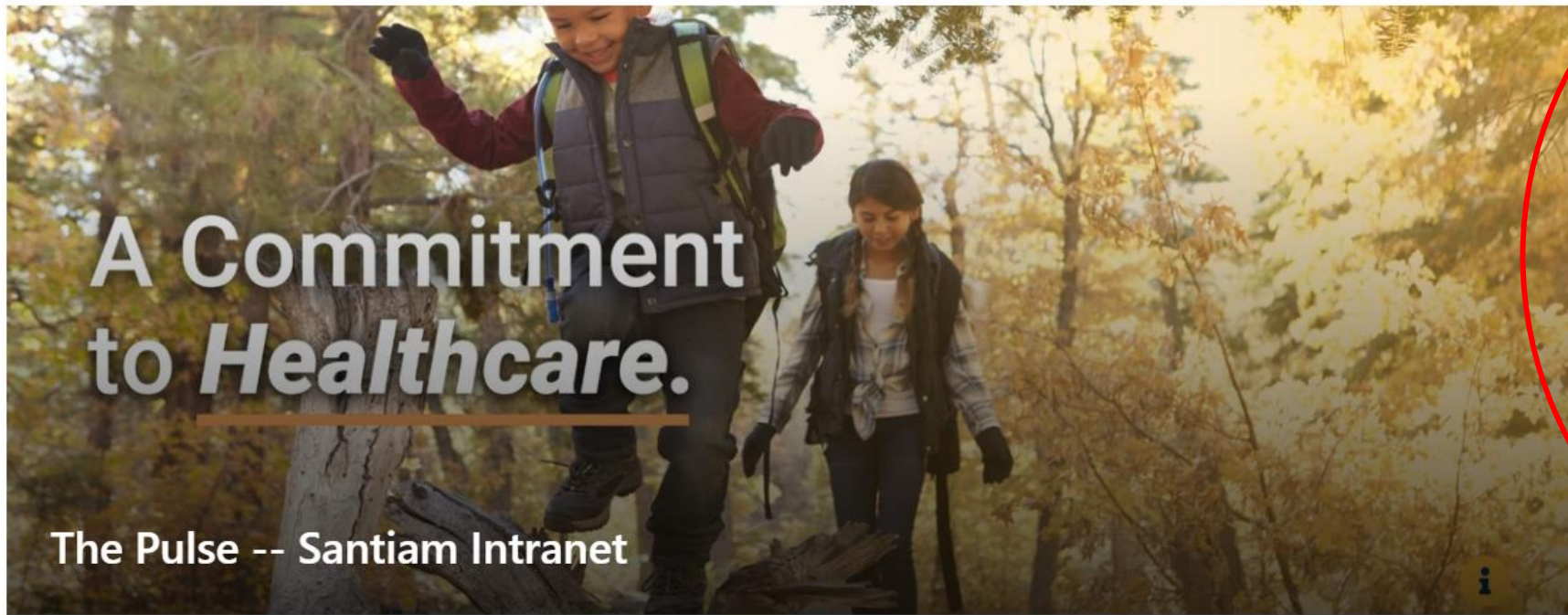
Pulse Notification

89

All of the Above

BI-WEEKLY UPDATE ON THE PULSE

The screenshot displays a SharePoint page with a blue header bar containing the 'SharePoint' logo, a search bar, and utility icons. Below the header, a toolbar includes options like 'Save as draft', 'Undo', 'Discard changes', 'Page details', and 'Analytics'. A status message indicates 'Your draft has been saved'. The main content area features a video player with a thumbnail image of two people hiking in a forest. The video title is 'A Commitment to Healthcare.' and the subtitle is 'The Pulse -- Santiam Intranet'. To the right, a draft preview window is visible, showing a red circle around a section with the text '#ForwardTogether' and 'BI-WEEKLY UPDATE'. Below the video, there is a 'News' section with an 'Add' button and a 'See all' link. A news item titled 'RETIREMENT- Advisor Meeting June 6th at Noon - AUDITORIUM' is partially visible. At the bottom, there is a section for 'ALL STAFF FORUM' with a 'See all' link and a video thumbnail for 'All Staff Forum - April 2024'.



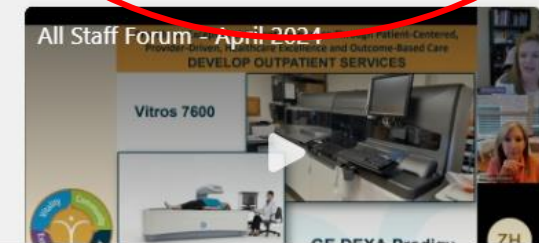
#ForwardTogether
BI-WEEKLY
UPDATE

News [See all](#)

+ Add

RETIREMENT- Advisor Meeting June 6th at Noon - AUDITORIUM

ALL STAFF FORUM [See all](#)



LET'S KEEP IN TOUCH!



Bi-weekly Update on The Pulse



Monthly All Staff Forums



Community Engagement

Ways to Engage

18

Teams Forum

10

In-Person Forums

32

Email

2

Pulse Notification

89

All of the Above

Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH



Join Us for a Community Town Hall

Santiam Hospital & Clinics and Samaritan Health Services
Announce Affiliation Pursuit

We want to hear from YOU, our valued community members!

Tuesday, June 18th, 6PM

Santiam Hospital & Clinics Freres Auditorium

Wednesday, June 26th, 6PM

Turner Fire Department

Thursday, June 27th, 6PM

Santiam Jr./Sr. High School, Building C, Commons Room

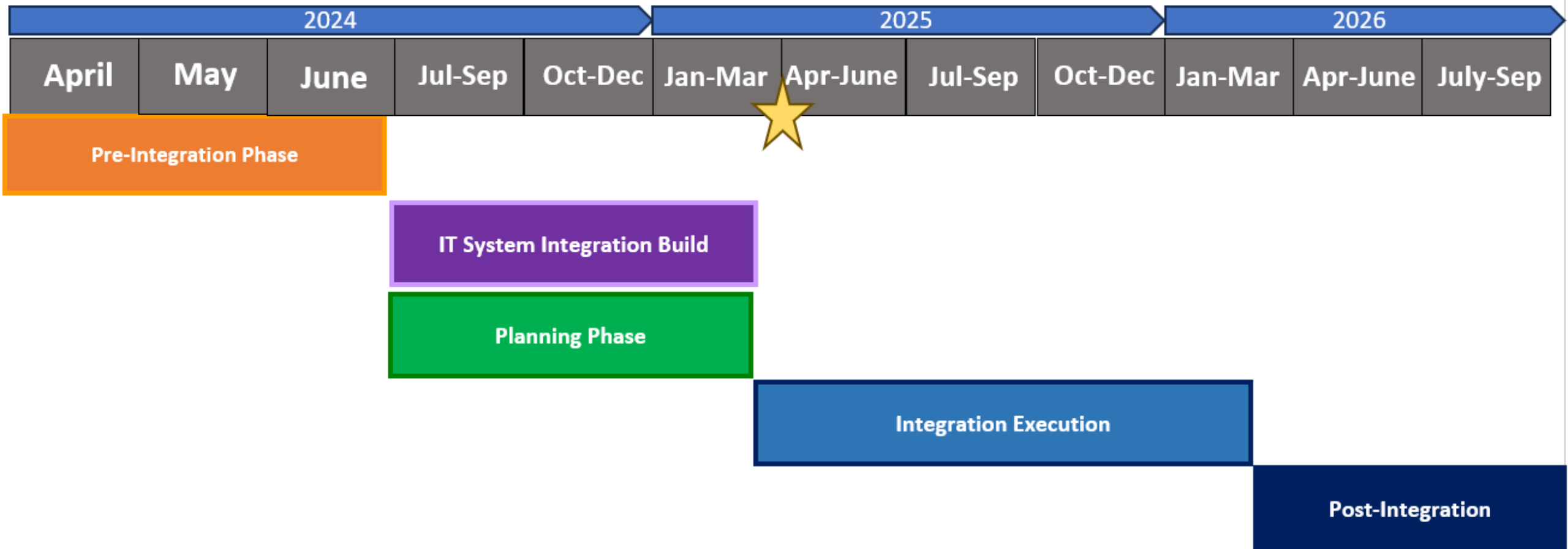


Scan this QR code to register or visit [SantiamHospital.org](https://www.SantiamHospital.org) or
<https://schedule.planhero.com/events/5d0978cef/community-town-hall>

Planning for Definitive Agreement



Proposed Affiliation Timeline





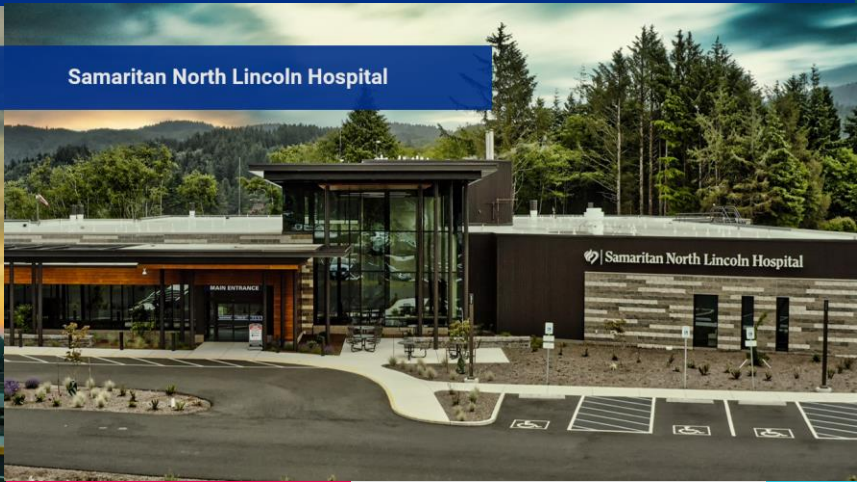
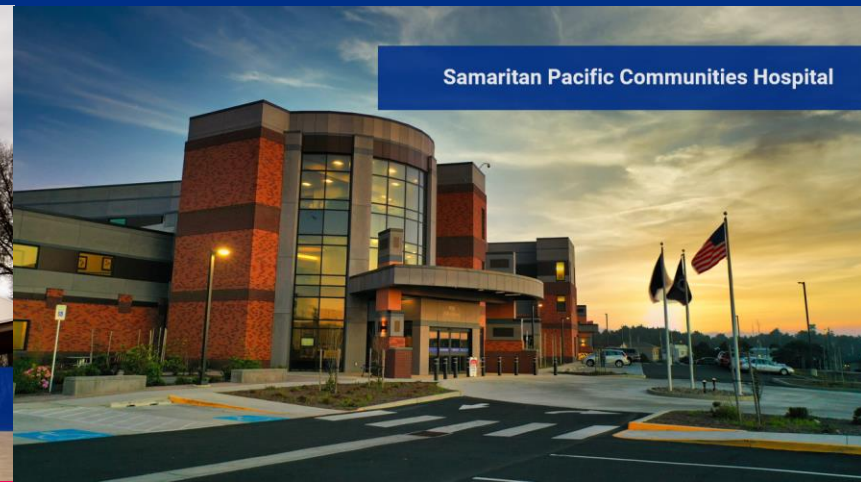
Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH



GENERAL MEMBERSHIP COMMITTEE MEETING

June 7, 2024



AGENDA

- I. CALL TO ORDER**
- II. APPROVAL OF MINUTES**
- III. INTRODUCTIONS / ANNOUNCEMENTS**
- IV. UNFINISHED BUSINESS**
- V. NEW BUSINESS**
 - B. Medical Staff Executive Committee (Dr. Dessieux)
 - 1. Medical Executive Committee Report
 - C. Performance Improvement Clinical Committees Reports
 - A. Administrative Report
 - 1. Community Relations
 - 2. Financial / Utilization Data
 - 3. Patient Services
 - 4. Operational Services
 - 5. Information Technology Matters
 - 6. Human Resources
 - 7. Regulatory Matters
 - 8. Internal Projects
 - 9. Healthcare Reform
 - 10. Medical Clinics
 - 11. Provider Recruitment
 - 12. Performance Improvement
 - 13. Wellness
- VI. ADJOURNMENT**



Forward Together



Samaritan
Health Services

Santiam Hospital & Clinics
embrace HEALTH



Join Us for a Community Town Hall

Santiam Hospital & Clinics and Samaritan Health Services
Announce Affiliation Pursuit

We want to hear from YOU, our valued community members!

Tuesday, June 18th, 6PM

Santiam Hospital & Clinics Freres Auditorium

Wednesday, June 26th, 6PM

Turner Fire Department

Thursday, June 27th, 6PM

Santiam Jr./Sr. High School, Building C, Commons Room



Scan this QR code to register or visit [SantiamHospital.org](https://www.SantiamHospital.org) or
<https://schedule.planhero.com/events/5d0978cef/community-town-hall>





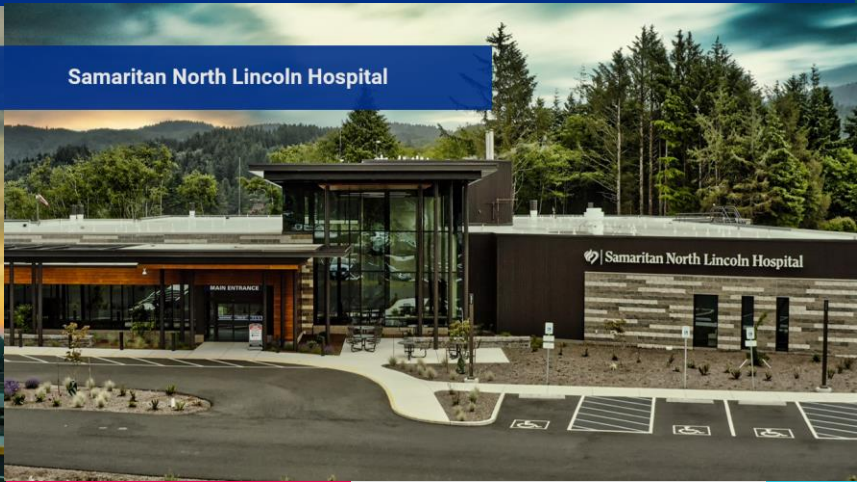
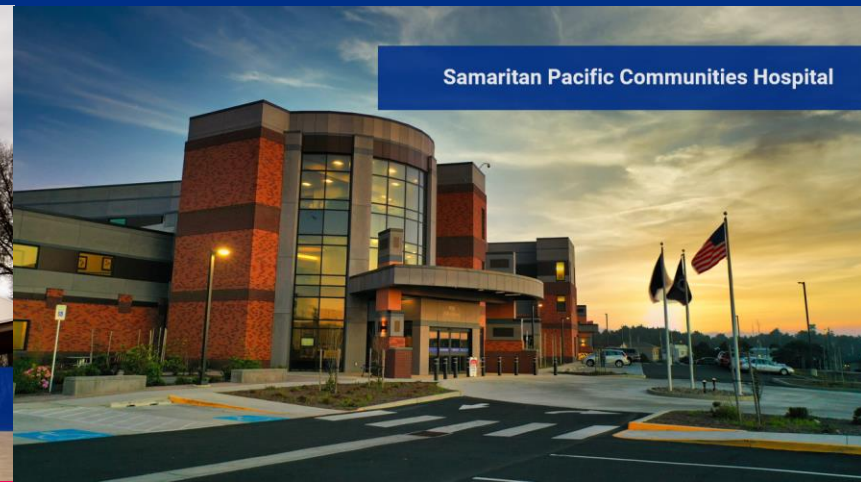
Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH

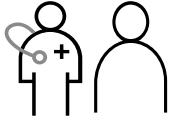


Samaritan Medical Group



Samaritan
Medical Group

Samaritan Medical Group At-A-Glance



Our People

- System: 6,500 employees
- Medical Group: 620 clinicians; 930 staff



Our Structure

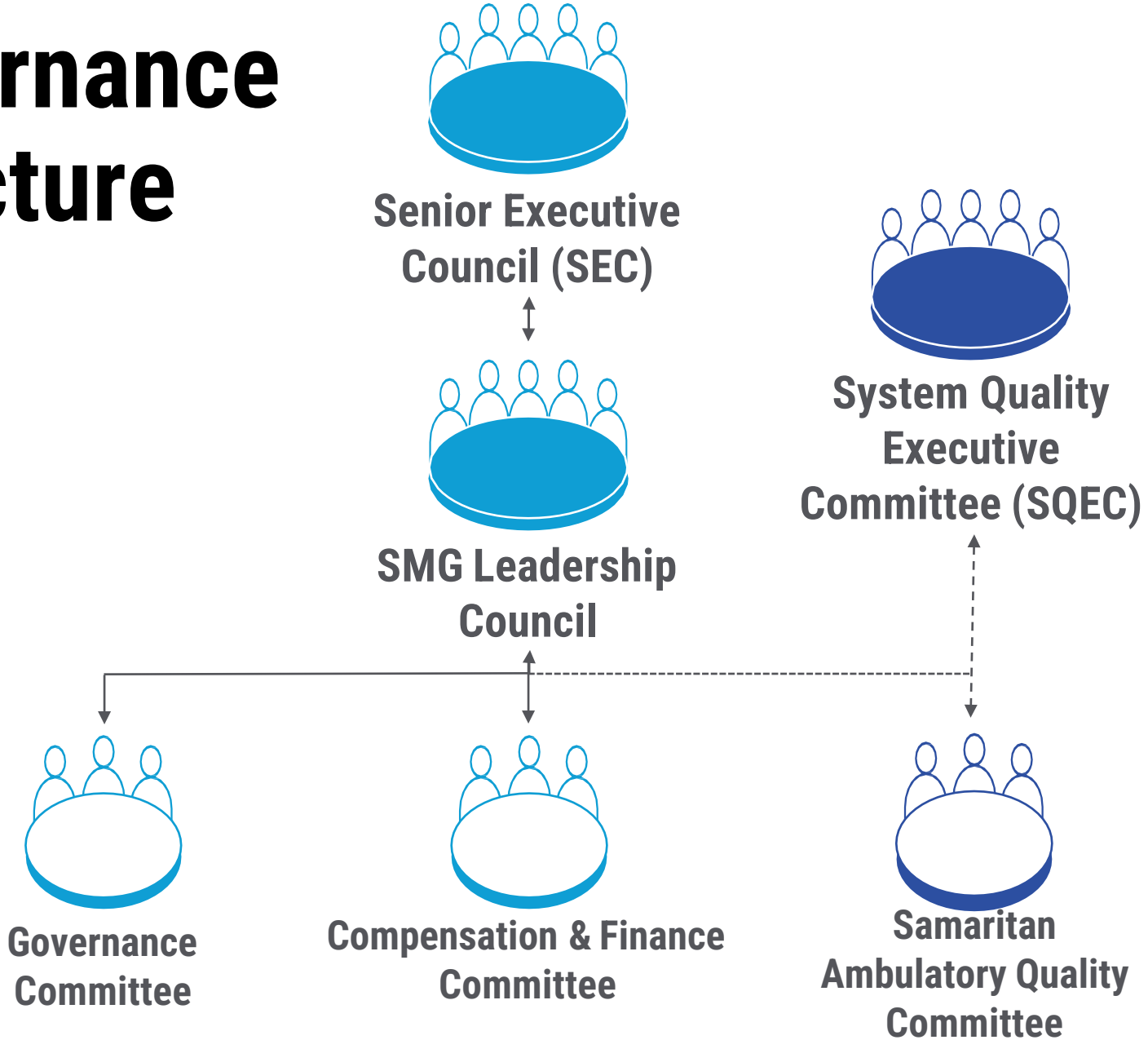
- Non-profit, Integrated Delivery System
- 5 Clinical Divisions
 - Primary Care
 - Surgical Specialties
 - Medical Specialties
 - Acute Care & Hospitalists
 - Behavioral Health
- Dyad Leadership Model
- Health Plans

Our Facilities



- Five acute care hospitals
 - Level II trauma center
 - Community-based hospital
 - 3 critical access hospitals
- Over 80 clinic locations
 - Primary & Specialty clinics
 - Urgent Care/Walk-In clinics

Governance Structure



Recommendation:

- SH&C Designated Seat on Leadership Council
- Representation on all Governing Committees on 4/1/25

• There are opportunities for SHC leadership to be appointed & integrated into SMG's Governance Structure

• Openings would be available on all councils and committees listed above

The Foundation of our Management Structure

Dyad Leadership Model



*Clinician
Leader*



*Operational
Leader*

- ✓ Work together as a team to drive clinical and business outcomes
- ✓ At all levels/areas throughout Samaritan Medical Group

Recommendation to ensure a successful transition:

- Expand the SMG Executive Team to include SHC leadership through the transition period
- Two roles, one clinical and one operational in alignment with Dyad model
- SHC Dyad would participate in the executive team meetings as well as attend the Leadership Council

Organizational Structure



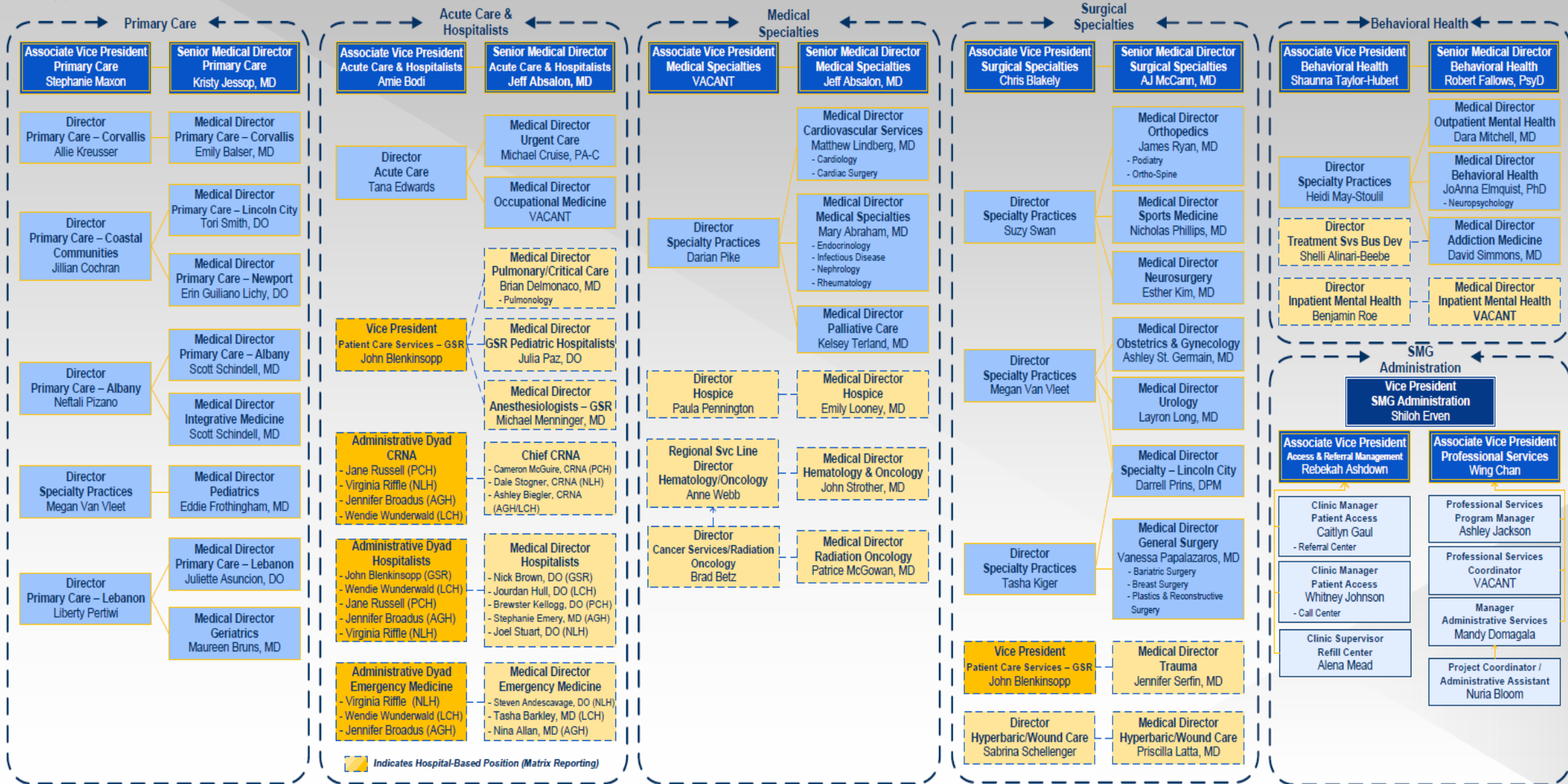
Edited: 3/25/2024

SVP/Chief Physician Executive
Samaritan Health Services
Robert Tumgren, MD

VP/Chief Operating Officer
Samaritan Medical Group
Julie Osgood

Clinical-Operational & Administrative Leadership Structure

Senior Medical Director & Medical Director Dyads



Samaritan Medical Group Culture



Samaritan
Health Services

PRIDE Values

Passion
Respect
Integrity
Dedication
Excellence



Samaritan
Medical Group

Guiding Principles

Clinician-led, patient-centric
Market-based
Equitable
National Best Practices
Commitment to Wellness
Sustainability
Transformation
Innovation

High Reliability Organization / Commitment to Zero Harm



Samaritan
Health
Services

Compensation Plan Types

	Primary Care	Specialist	Years of Experience	Time-Based
Salary Informed By	wRVU productivity and panel size	wRVU productivity	Years of Experience	Competitive Salary set based on market
Incentive Opportunities	Exceeding previous years productivity and/or panel size	Exceeding previous years wRVU productivity	Achievement of practice-based productivity metrics	Picking up additional shifts and/or wRVU productivity
Types of Clinicians	Physicians and APCs	Physicians and APCs	Areas where wRVU productivity is challenging to benchmark or strategic initiative	Hospitalists, ED Clinicians, Urgent Care



Forward Together

Please join us

SANTIAM MEDICAL STAFF & SMG EXECUTIVE TEAM MIXER

June 19
5:30-7:30pm
Coria Estates
8252 Redstone Ave SE
Salem, Oregon 97306

Please RSVP by accepting the
calendar invite

**JOIN
US!**



The remainder of the presentation has been redacted.



WELCOME
TO
COMMUNITY TOWNHALL

Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH



“Building a long-lasting healthcare system for decades to come.”



Why Partner?



Why Now?



Why Samaritan?

STRATEGIC PRIORITIES



CULTURE COMPASS



Pacific Coast



99W

I-5





“Building a long-lasting healthcare system for decades to come.”



Why Partner?



Why Now?

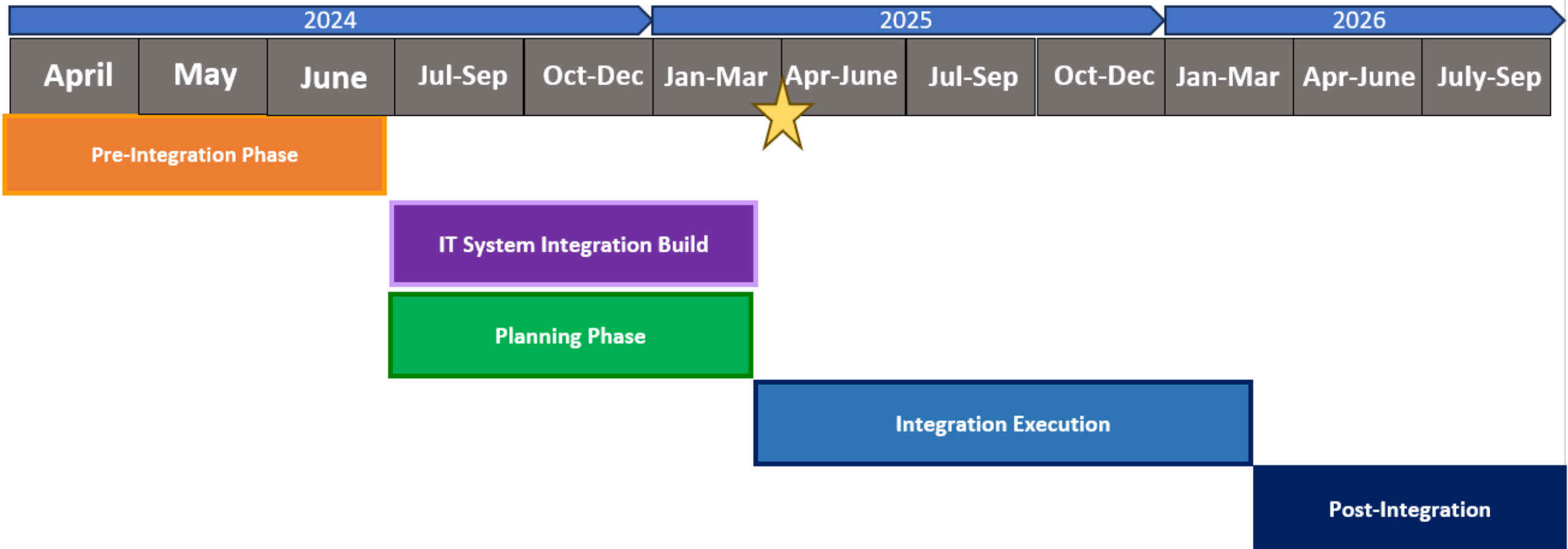


Why Samaritan?



What's Next?

Proposed Affiliation Timeline



SERVICE INTEGRATION





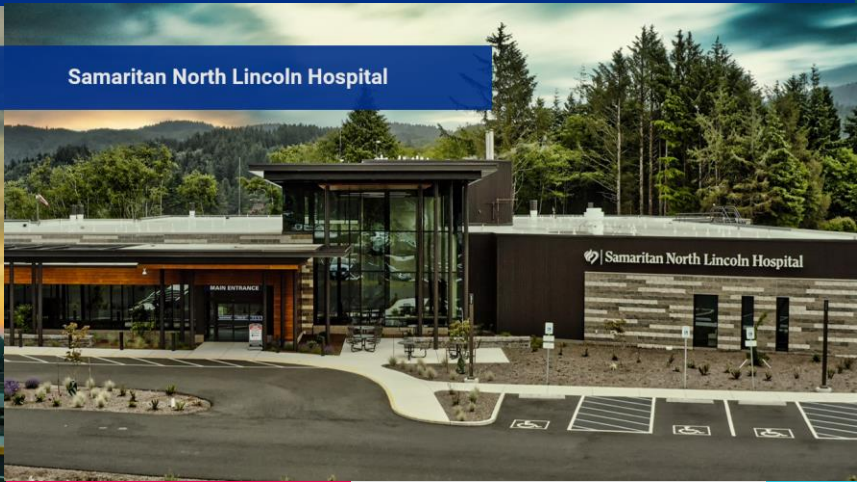
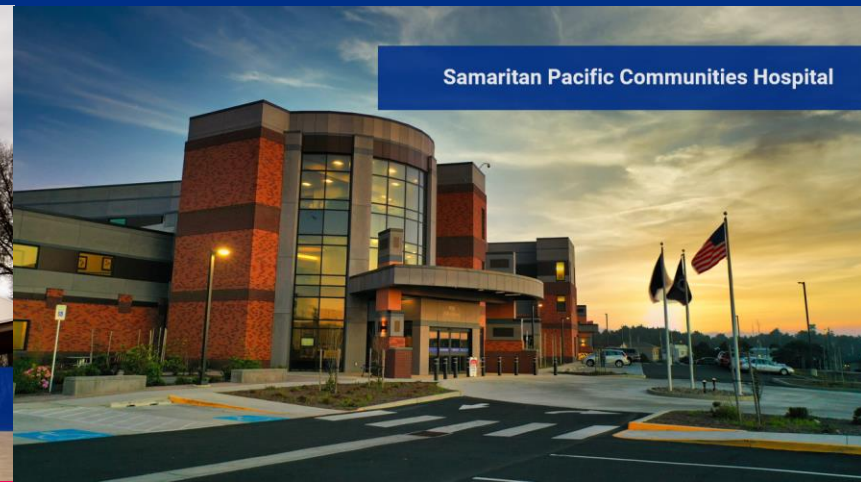
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ALL STAFF FORUM

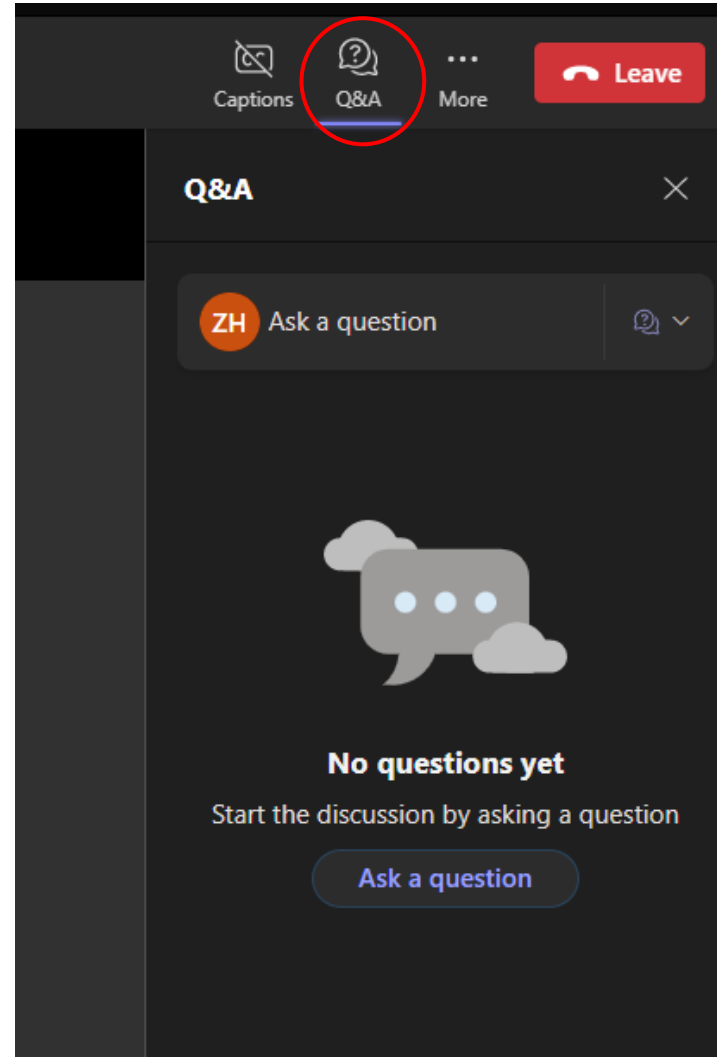
July 17th, 2024

12:15 – 12:45 PM

#ForwardTogether

WE WANT TO HEAR FROM YOU!

Please utilize the Q&A (not the chat) section for any questions or comments.



Forward Together



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Affiliation Update

LET'S KEEP IN TOUCH!



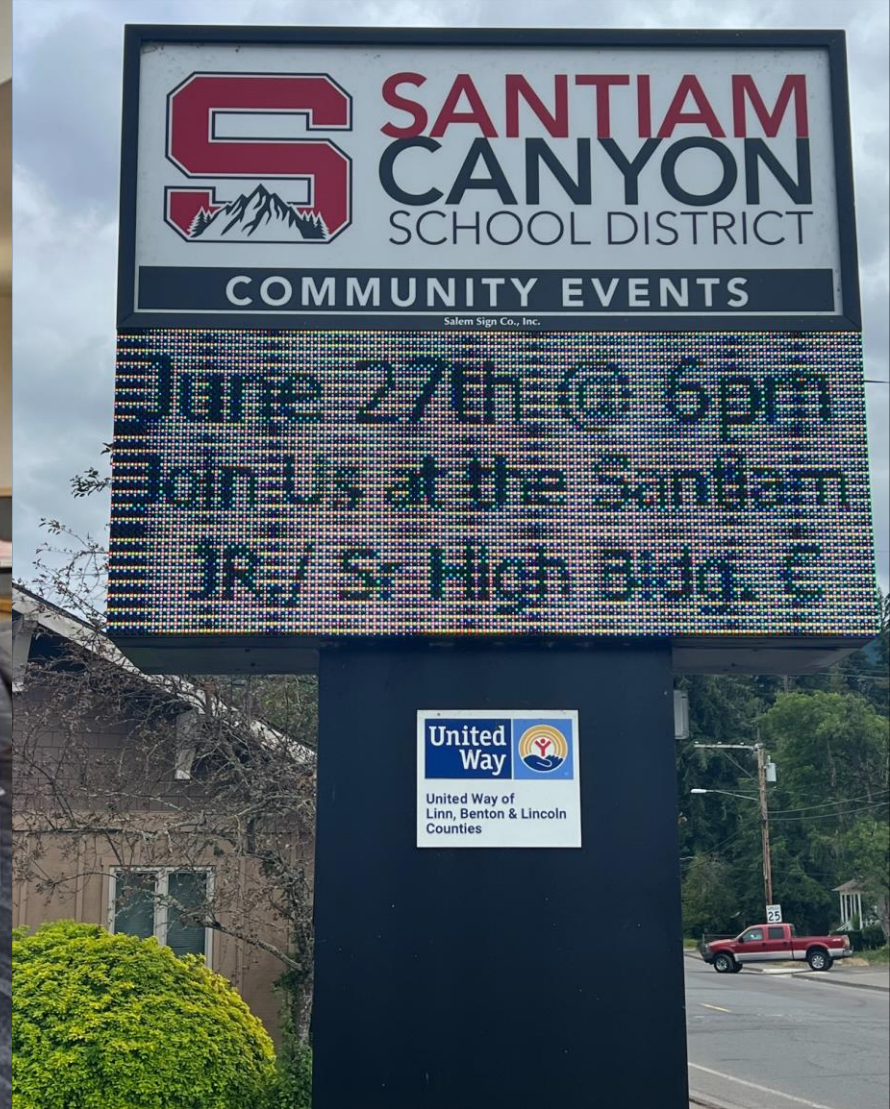
Bi-weekly Update on The Pulse



Monthly All Staff Forums



Community Engagement



Community Town Hall

*FREQUENTLY
ASKED
QUESTIONS
UPDATED*

- Why is Santiam Hospital & Clinics considering an affiliation with another Health System?
- Who made the decision for Santiam Hospital & Clinics to potentially transition from an independent hospital and clinics not-for-profit to a larger non-profit system?
- Why Samaritan Health Services?
- What will Santiam Hospital & Clinics be called?
- Will Santiam Hospital & Clinics retain its not-for-profit status?
- What are the next steps and what is the timeline?
- What does this mean for employees at Santiam Hospital & Clinics?
- Will there be any changes to employees' pay or benefits?
- Is my job secure?
- How can Santiam Hospital & Clinics employees offer feedback, suggestions, or thoughts in general to the news of pursuing affiliation?
- How do the community and patients receive updates on the exploration of a potential affiliation between Santiam Hospital & Clinics and Samaritan Health Services?

BI-WEEKLY UPDATE ON THE PULSE

The screenshot displays a SharePoint page with a blue header bar containing the 'SharePoint' logo, a search bar, and utility icons. Below the header, a toolbar includes 'Save as draft', 'Undo', 'Discard changes', 'Page details', and 'Analytics'. A notification states 'Your draft has been saved'. A 'Republish' button is visible in the top right. The main content area features a video player with a background image of two people hiking in a forest. The video title is 'A Commitment to Healthcare.' and the subtitle is 'The Pulse -- Santiam Intranet'. Below the video, there is a 'News' section with an 'Add' button and a 'See all' link. A news item titled 'RETIREMENT- Advisor Meeting June 6th at Noon - AUDITORIUM' is partially visible. On the right side, a draft preview window is open, showing a red circle around the content. The preview includes a dark blue header with the hashtag '#ForwardTogether', followed by the text 'BI-WEEKLY UPDATE' in red. Below this, there is a section titled 'ALL STAFF FORUM' and a video thumbnail for 'All Staff Forum - April 2024'.

SharePoint

Search in SharePoint

Save as draft Undo Discard changes Page details Analytics

Your draft has been saved Share Republish

#ForwardTogether

**BI-WEEKLY
UPDATE**

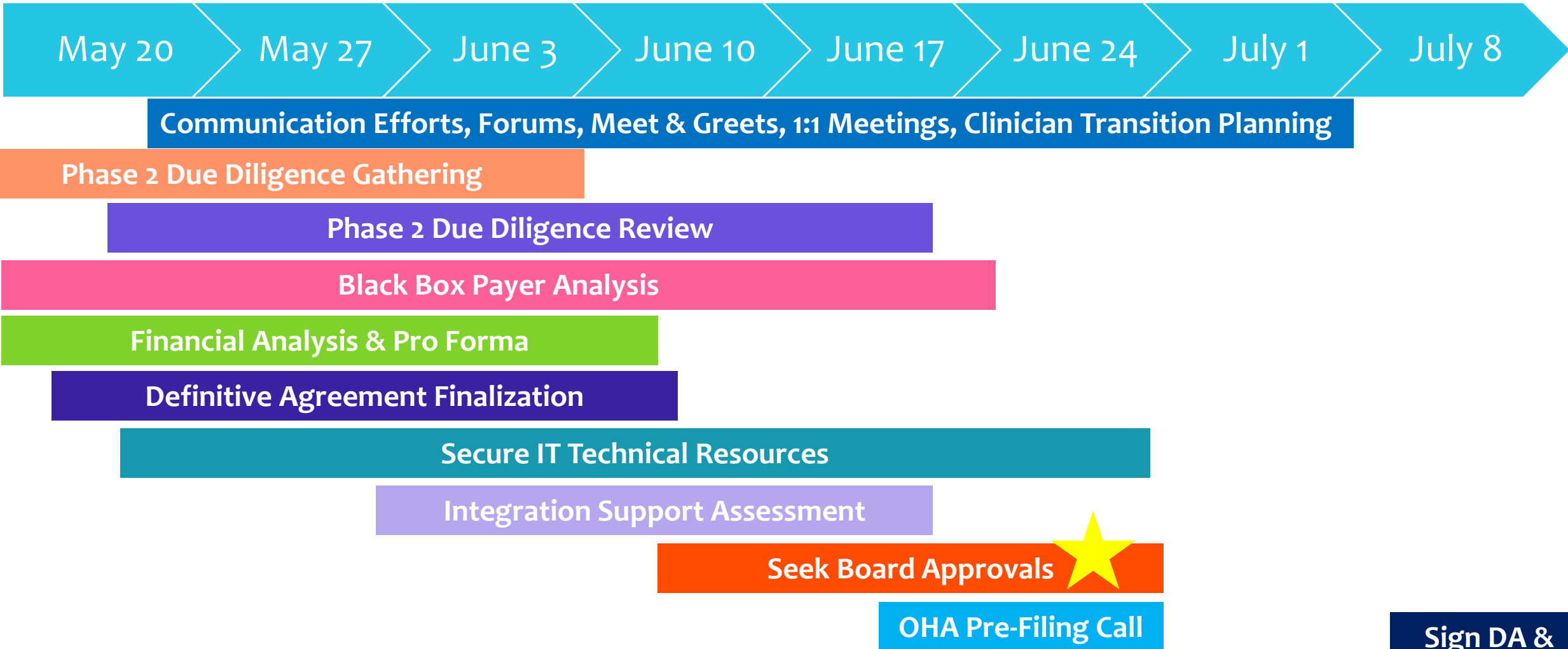
ALL STAFF FORUM See all

All Staff Forum - April 2024
Patient-Centered, Provider-Driven, Evidence and Outcome-Based Care
DEVELOP OUTPATIENT SERVICES

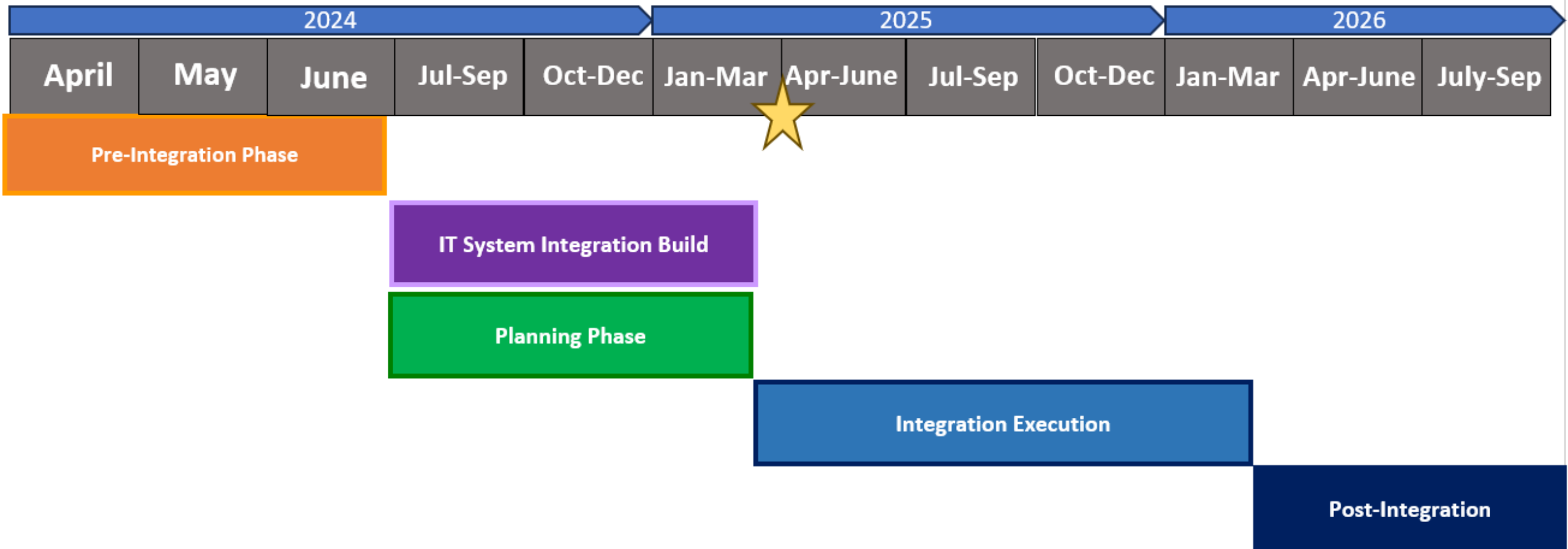
Vitros 7600

RETIREMENT- Advisor Meeting June 6th at Noon - AUDITORIUM

Planning for Definitive Agreement



Proposed Affiliation Timeline





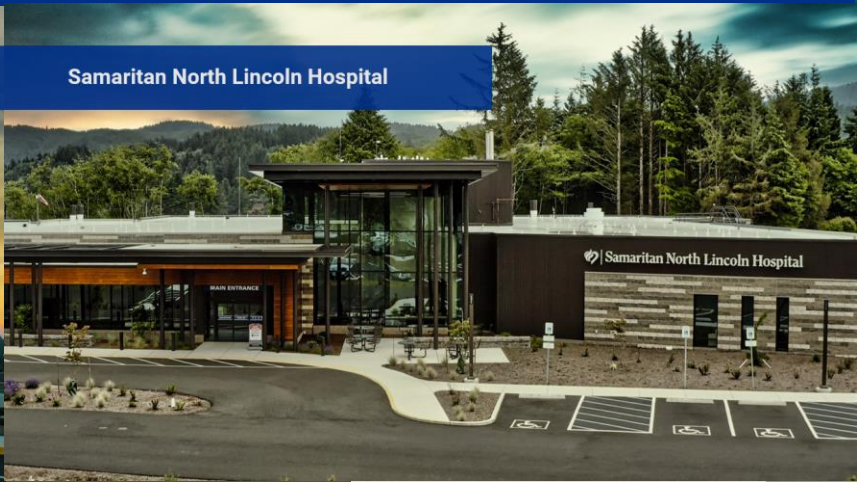
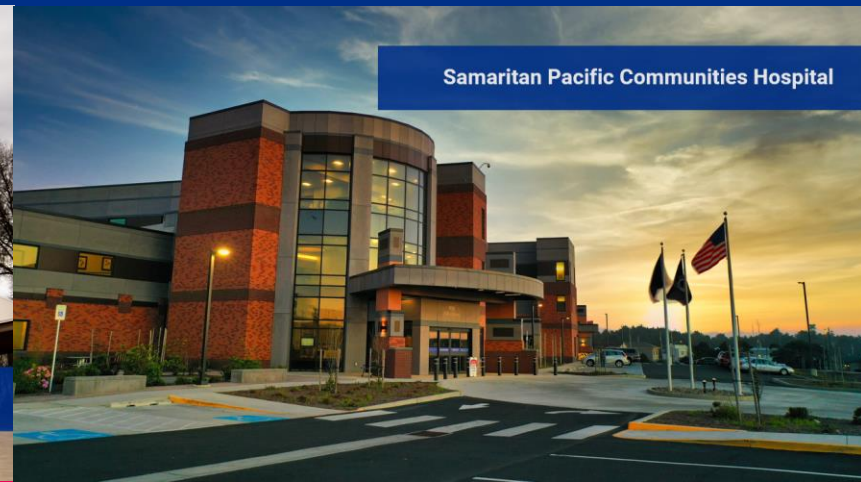
Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
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ALL STAFF FORUM

August 13th, 2024

12:15 – 12:45 PM

#ForwardTogether

Forward Together



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Health Services

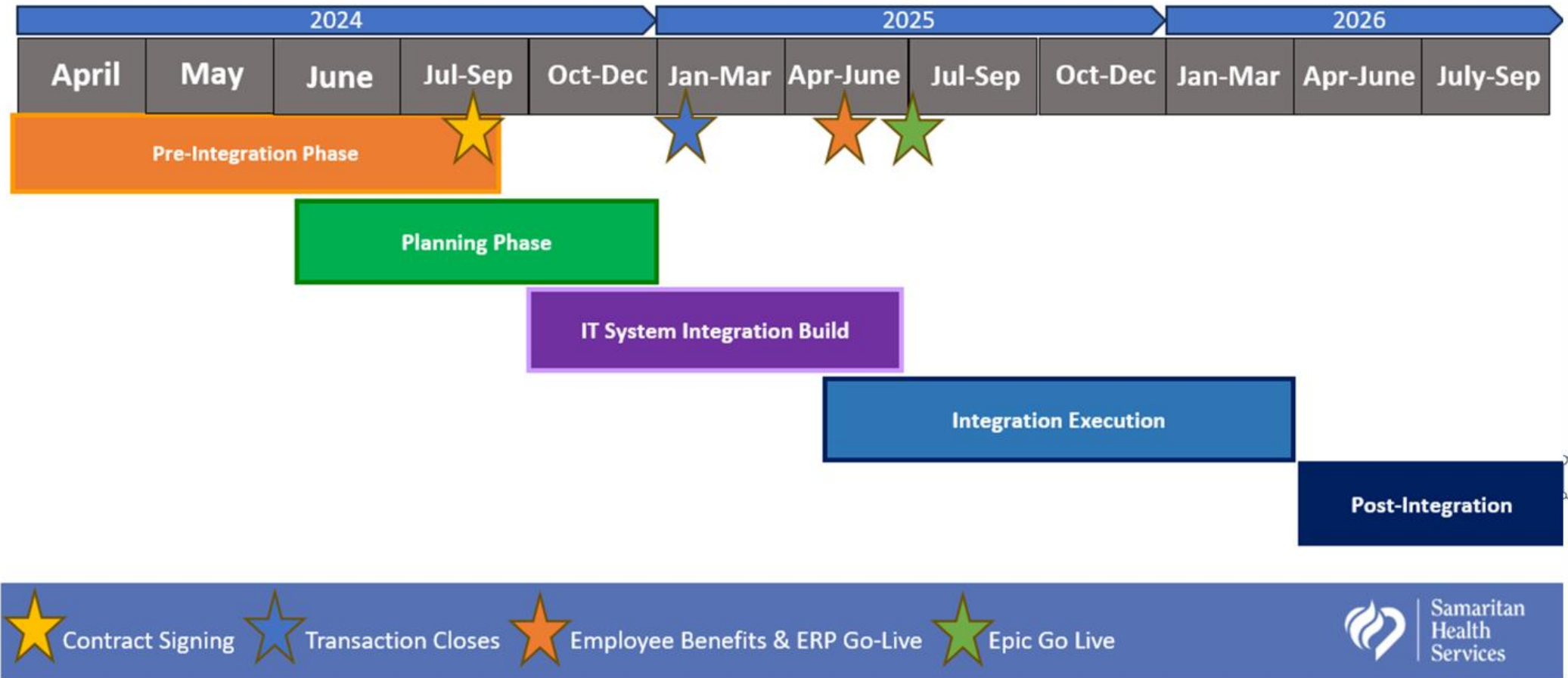


Santiam Hospital & Clinics
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Affiliation Update

Proposed Affiliation Timeline

Potential Affiliation Timeline





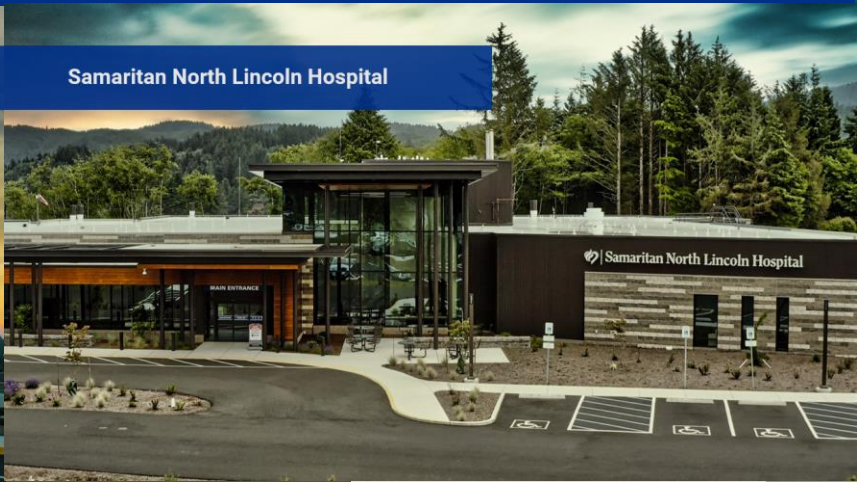
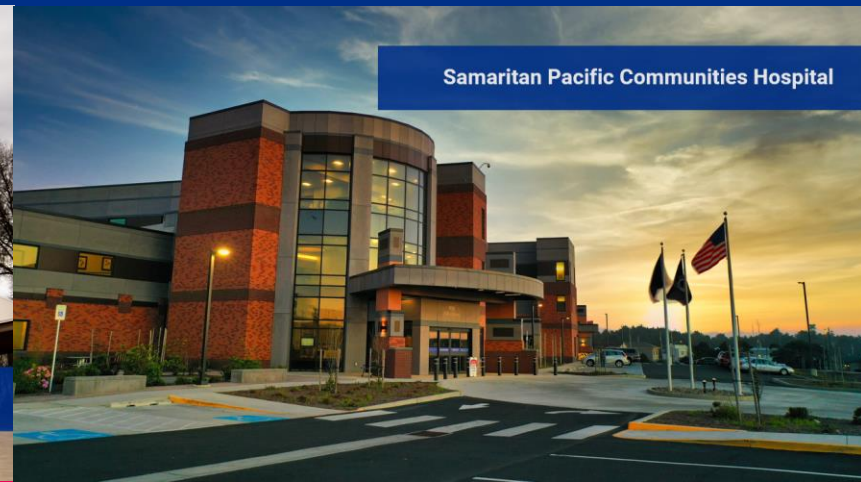
Forward Together



Samaritan
Health Services



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ALL STAFF FORUM

September 26th, 2024

12:15 – 12:45 PM

#ForwardTogether

Forward Together



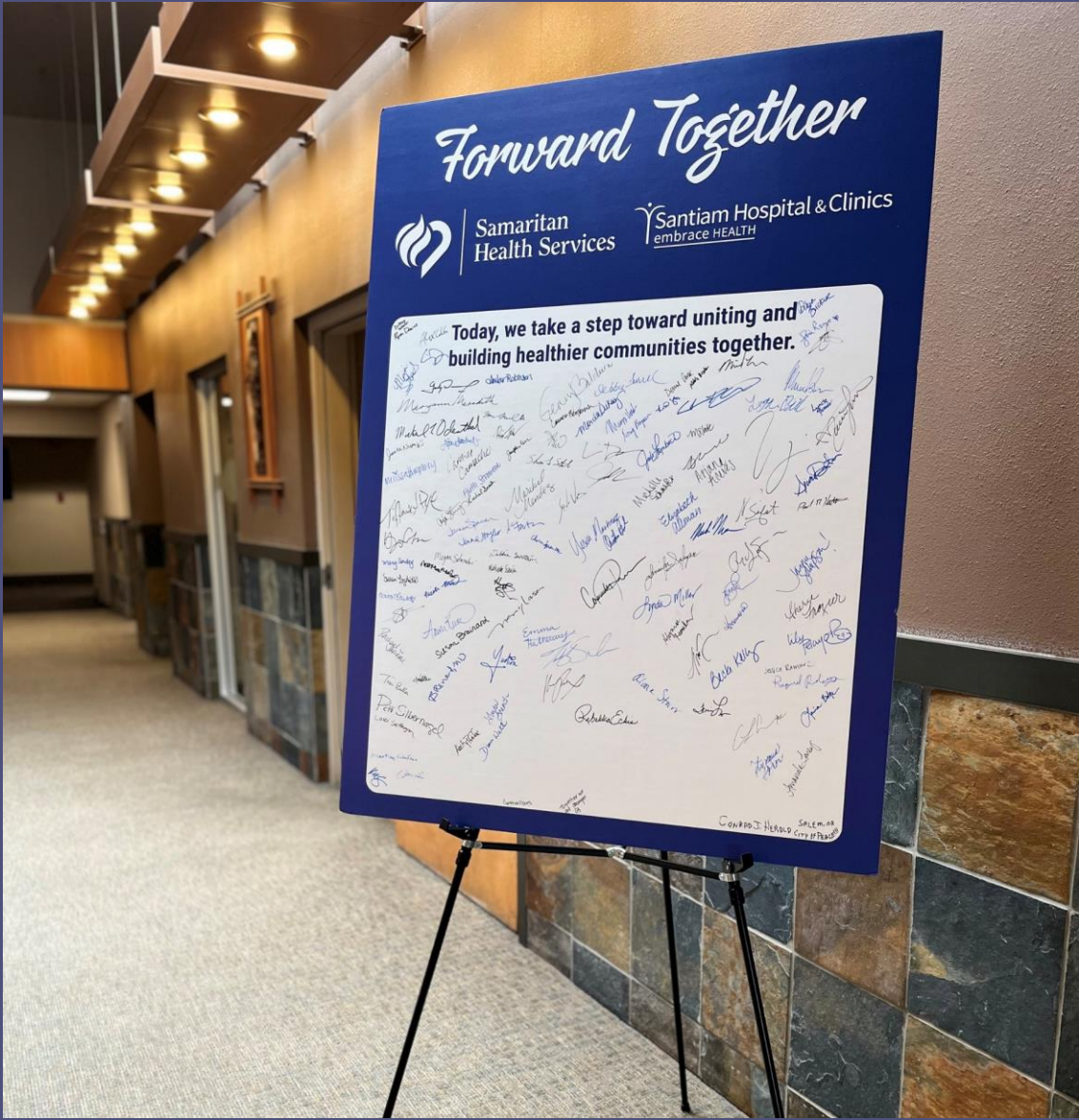
Samaritan
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Affiliation Update

WE SIGNED!!!



Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
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- Visit <https://samhealth.org/news/forward-together/> for updates
- Staff FAQ on The Pulse

The screenshot shows the 'The Pulse' website interface. At the top, there are navigation links: 'The Pulse', 'Home', 'Hospital Manuals', 'S-Drive-Table of Contents-- Please validate with your manager before requesting access', 'Code Blue Sheet', and 'Campus Map'. Below the navigation, there are options for '+ New', 'Page details', and 'Analytics'. A news article is displayed with a photo of cookies and the text: 'It's Official! On September 12, we hosted an Affiliation Agreement signing ceremony including Santiam Board Members...'. The author is 'Maggie Hudson' and the date is 'September 17' with '162 views'. Below the article is a section titled 'Frequently used resources' containing a grid of 13 icons and their corresponding resource names: Hospital Directories, Hospital Maps, Staff Affiliation..., Epic-Citrix, Facilities Ticket, Centriq/Athen: Archive, Nutrition Care Manual, Santiam Store, Staff Handbook, Printers, Info & News, Medical Staff Member..., Cafeteria Menu, LexiComp, Birthday Calendar, CodeBlue, Hospital Manuals, S Drive Resources, Office, Relias, IT Helpdesk Ticket, and PayCom. A red arrow points from the 'Staff Affiliation...' resource icon to the news article.



Forward Together



Samaritan
Health Services



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- **June 1, 2025, Target Transaction Close Date**
 - Santiam Hospital & Clinics becomes Samaritan Santiam Hospital
 - Santiam employees become Samaritan employees
 - Santiam clinicians become part of Samaritan Medical Group

- **August 1, 2025, Target Epic & Associated Systems Go-Live**
 - Santiam conversion onto SHS Epic Instance
 - Peoplesoft for Accounting, Finance, and Supply Chain
 - Credentialing, Licensing, Payor Contracting, Billing & Coding





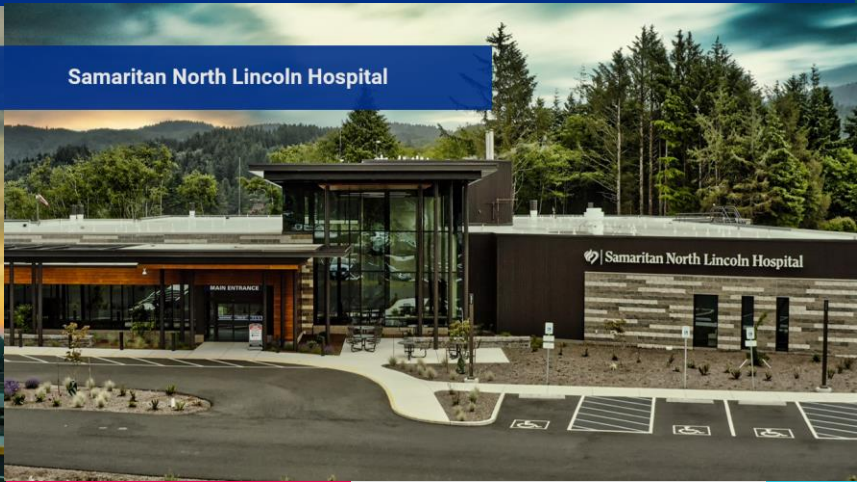
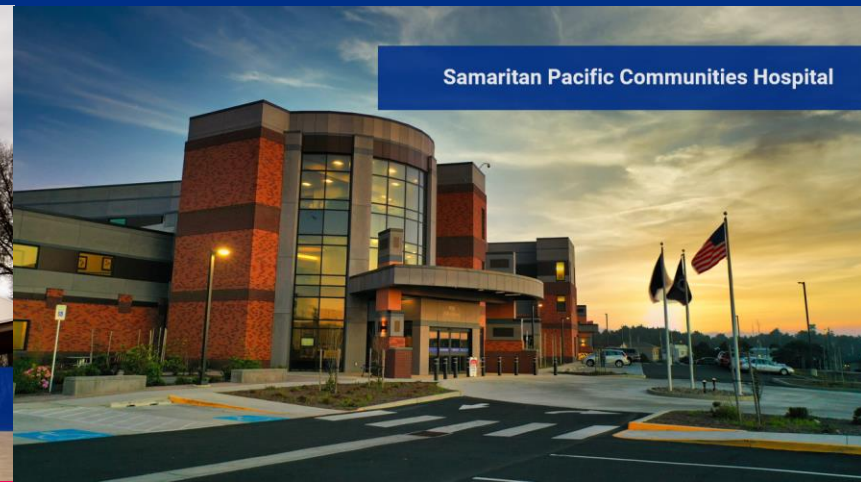
Forward Together



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The remainder of the presentation has been redacted

Forward Together



Samaritan
Health Services



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Join Us for a Community Town Hall

Santiam Hospital & Clinics and Samaritan
Health Services Announce Affiliation Pursuit

*We want to hear from YOU,
our valued community members!*

Tuesday, June 18th, 6PM

Santiam Hospital & Clinics Freres Auditorium

Wednesday, June 26th, 6PM

Turner Fire Department

Thursday, June 27th, 6PM

Santiam Jr./Sr. High School, Building C, Commons Room



Scan this QR code to register or visit [SantiamHospital.org](https://www.santiamhospital.org) or
<https://schedule.planhero.com/events/5d0978cef/community-town-hall>



Samaritan
Health Services



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503-706-6642

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Samaritan Health Services
kschauer@samhealth.org

For immediate release

Samaritan Health Services and Santiam Hospital & Clinics announce plans to pursue an affiliation

Corvallis, Ore., May 22, 2024 – Samaritan Health Services and Santiam Hospital & Clinics announced today their plan to pursue formal affiliation. The organizations have signed a nonbinding letter of intent (LOI) to allow the parties to further evaluate the affiliation with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

“We are excited about working more closely with the team at Santiam Hospital & Clinics as we move into this next phase of our collaboration,” said Doug Boysen, president and chief executive officer of Samaritan Health Services. “Throughout our discussions, it has been clear that the alignment of our organizations – our missions, values and culture – positions us well to strengthen services across the region for those in our communities.”

“We are focused on serving our respective communities and learning from each other. Our shared strengths position us well for continued vitality so we both remain long-lasting institutions,” said Maggie Hudson, president and chief executive officer of Santiam Hospital & Clinics. “Looking toward this process, I’m driven by the relationships we are forging between our organizations, leaders and clinicians in order to better serve our communities.”

As nonprofit, community-based health systems with similar missions, visions, values and cultures, both organizations share a commitment to keeping services local. Joining together through affiliation would strengthen both organizations through increased access to services, improving health equity and enhancing services provided to communities throughout the mid-Willamette Valley and central Oregon coast regions.

“The health care industry is evolving, and we believe that this affiliation will ensure that Samaritan Health Services and Santiam Hospital & Clinics both remain sustainable, strong institutions, providing access to quality health care,” said Boysen.

The organizations are committed to maintaining local governance and leadership and retaining existing staff and clinicians.

“To fulfill our mission, we will need the contributions of our talented and dedicated staff and clinicians; and we know that bringing together expertise from both systems will enhance our respective operations and services,” said Hudson.

Samaritan Health Services and Santiam Hospital & Clinics will work toward coming to terms on a definitive agreement in the coming months. The affiliation may be subject to regulatory review.

Samaritan Health Services

Samaritan Health Services is a nonprofit regional health system that brings together five community hospitals, more than 100 physician clinics and multiple health insurance plans to serve more than 290,000 residents in Oregon’s Benton, Lincoln and Linn counties.

Samaritan employs more than 6,000 workers, including 620 clinicians, and is governed by a volunteer board, which includes community members, physicians and hospital leaders.

samhealth.org

Santiam Hospital & Clinics

Santiam Hospital & Clinics is also a nonprofit health care organization, governed by a volunteer board of directors. Santiam Hospital & Clinics is comprised of an independent, acute-care hospital in Stayton, Oregon, operating 11 clinics serving the Santiam Canyon in Marion and Linn counties. Santiam Hospital & Clinics serves more than 40,000 residents and employs more than 600 staff, including 70 medical staff who are committed to excellence in community-based care. santiamhospital.org

###



Samaritan Health Services, Santiam Hospital & Clinics Announce Plans to Pursue an Affiliation

Frequently Asked Questions

What Does This Letter of Intent (LOI) Mean?

The nonbinding letter of intent signed by Samaritan Health Services and Santiam Hospital & Clinics leadership means that we are both interested in working toward Santiam Hospital & Clinics joining Samaritan Health Services. Because the agreement is nonbinding, either organization can decide to stop participating in the process.

What Is the Anticipated Outcome of the LOI?

The outcome of the LOI is two-fold: first to begin this phase of due diligence and second to determine if we want to move forward with a formal affiliation in the future. If that is decided, both organizations will jointly submit a formal request for affiliation to the state.

Will the Oregon Health Authority Review This Request?

If, as we navigate through all stages of the affiliation process, both Samaritan and Santiam ultimately decide to pursue a formal integration, a definitive agreement would be signed, and we will request review from OHA's Health Care Market Oversight program.

What Is the Timeline for This Affiliation Process?

Complete affiliation could take up to a year or more.

How Did These Two Organizations Decide to Move in This Direction?

With thorough research into health care organizations, leadership identified that both organizations are well matched in their health care services, vision, mission, and cultural alignment.

Who Made the Decision to Pursue Affiliation?

The decision to explore potential affiliation was made jointly by both system's executive leadership and boards of directors. Both boards supported this next step in the process unanimously.

What Does This Mean for Employees at Santiam Hospital & Clinics & Samaritan Health Services?

In the near term, some employees may be asked to contribute data to help support next steps. The organizations are committed to maintaining local governance and leadership and retaining existing staff and clinicians. In terms of clinical service, this process will not impact how either organization serves the community or provides patient care.

How Will This Impact the Care That Patients Receive at Each System?

In the near term, there should be no change to patient care as a result of this portion of the process. Both of our missions center on providing care for our communities, and that remains our priority.

How Will This Impact the Service That Members Receive at Samaritan Health Plans?

There should be no change to the service members of Samaritan Health Plans receive as a result of this affiliation process.

How Will This Impact the Donors & Supporters?

Our alignment extends to local philanthropy as well as clinical care. Donors can support local services through the Santiam Hospital & Clinics Foundation or any of the five Samaritan hospital foundations.

How Can Community Members Formally Share Their Thoughts About the Affiliation?

The OHA review process includes a period of public comment which would allow members of the community to share their thoughts.

How Will Employees & Community Members Learn More About the Process?

Executive leadership at both Samaritan Health Services and Santiam Hospital & Clinics are committed to providing updated information as it becomes available throughout this process. These updates may look like emails, meetings and employee forums for internal audiences or public announcements, community town halls and additions to the FAQ for the community.

Will United Healthcare or Kaiser insurance be accepted once Santiam Hospital & Clinics becomes part of the Samaritan Health Services?

As we are at the beginning of this affiliation process, there are more questions than answers at present. We are committed to transparent communication throughout and will provide ongoing information as it becomes available.

Will Santiam clinics also become part of the Samaritan Health Services System? Will all the Santiam Hospital Medical Clinics stay open?

Yes, Santiam Medical Clinics will remain open to serve patients and would ultimately join Samaritan Medical Group.

How will Samaritan Health Services and Santiam Hospital & Clinics benefit from this affiliation?

This potential affiliation positions Samaritan Health Services and Santiam Hospital & Clinics to strengthen services across the region for those in their communities. Bringing together expertise from both systems will enhance the respective operations and services of both.

Frequently Asked Questions (FAQ) **Santiam Hospital & Clinics Staff**

Regarding: Samaritan Health Services and Santiam Hospital & Clinics Announce Affiliation Pursuit

Q: Why is Santiam Hospital & Clinics considering an affiliation with another Health System?

A: As we know, the healthcare environment is continuously changing; as a result, partnerships have become more important than ever. Partnerships and collaboration are the models of providing exceptional healthcare now and into the future. A symbiotic partnership will allow us to maintain our services and continue to pivot and grow to meet our community's needs.

Q: Who made the decision for Santiam Hospital & Clinics to potentially transition from an independent hospital and clinics not-for-profit to a larger non-profit system?

A: Santiam Hospital & Clinics decision to explore potential affiliation with Samaritan Health Services was a unanimous decision by Santiam Hospital & Clinics Board of Directors, CEO and President, and Executive Leadership. [Administration and Departments - Santiam Hospital](#)

Q: Why Samaritan Health Services?

A: After thorough research into healthcare organizations, we have agreed that Samaritan Health Services is the most aligned health care system with Santiam Hospital & Clinics in the services offered, mission, vision, culture, and community alignment. Local governance and the commitment to enhancing services is a key strength of the Samaritan system.

Q: What will Santiam Hospital & Clinics be called?

A: As we are at the beginning of this affiliation process, there are more questions than answers at present. We are committed to transparent communication throughout and will provide ongoing information as it becomes available.

Q: Will Santiam Hospital & Clinics retain its not-for-profit status?

A: Yes, Samaritan Health Services is also a non-profit. This transaction is called a “Member Substitution.” In effect, it is a like-for-like health system.

Q: What is a Letter of Intent (LOI)?

A: The non-binding LOI signed by Samaritan Health Services and Santiam Hospital & Clinics leadership demonstrates both systems are interested in exploring the possibility of Santiam Hospital & Clinics joining Samaritan Health Services. This agreement means we will expand the due diligence process and each organization will conduct further assessment. Because the agreement is non-binding, either organization can decide to stop participating in the process.

Q: What are the next steps?

A: The outcome of the LOI is two-fold: we continue to a second phase of due diligence; and next determine if we want to move forward with a formal affiliation in the future. If that is decided, both organizations will jointly submit a formal request for affiliation to the Oregon Health Authority.

Q: What is the timeline?

A: Santiam Hospital & Clinics have signed a letter of intent (LOI) allowing us to research and explore further a potential affiliation with an anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services within a year.

Q: What does this mean for employees at Santiam Hospital & Clinics?

A: In the near term, some employees may be asked to contribute to help inform the due diligence process. In terms of clinical service or daily operations, this process will not impact how either organization serves the community or provides patient care.

Q: Will there be any changes to employees' pay or benefits?

A: Our initial analysis indicates that benefits may be enhanced by joining Samaritan Health Services. Santiam Hospital & Clinics and Samaritan Health Services are committed to competitive wages and benefits. We will have transparent communication throughout and will provide ongoing information as it becomes available.

Q: Is my job secure?

A: Santiam Hospital & Clinics and Samaritan Health Services are committed to retaining clinicians and staff.

Q: How can Santiam Hospital & Clinics employees offer feedback, suggestions, or thoughts in general to the news of pursuing affiliation?

A: In the coming weeks, Maggie, CEO and President and others on the Santiam Hospital & Clinics leadership team will be meeting with individual departments. Additionally, we will host a staff forum in the coming weeks. In the meantime, you may provide feedback by completing the Employee Pulse Check Survey here: [Employee Pulse Check \(smartsheet.com\)](https://smartsheet.com)

Q: How do the community and patients receive updates on the exploration of a potential affiliation between Santiam Hospital & Clinics and Samaritan Health Services?

A: To learn more information visit: www.samhealth.org/forwardtogether

Additional FAQs updated 6-6-24

Q: Will Santiam Hospital & Clinics employees in shared service roles be asked to relocate, travel outside of the Santiam geographical area?

A: This is a question that we hope to have an answer to within the near months as we know it is important to staff to work locally, the community they live in. As we are at the beginning of this affiliation process, there are more questions than answers at present. We are committed to transparent communication throughout and will provide ongoing information as it becomes available.

Q: Is there a possibility that employee's current pay and benefits could be reduced?

A: Our initial analysis indicates that benefits and compensation may be enhanced by joining Samaritan Health Services. Santiam Hospital & Clinics and Samaritan Health Services are committed to competitive wages and benefits. We will have transparent communication throughout and will provide ongoing information as it becomes available.

Q: Will Santiam Hospital & Clinics employees continue to have a twenty percent discount from hospital and clinic bills if Santiam chooses to affiliate with Samaritan Health Services?

A: This is a question that we hope to have an answer to within the coming months as we know that employees value this added benefit. We do know that Samaritan Health Services is self-insured, and we will remain as a preferred network just as we are right now. We are committed to transparent communication throughout and will provide ongoing information as it becomes available.

Updated 7/2/24

Q: Will Santiam Hospital & Clinics employees continue to be able to use the on-site pharmacy with its continued benefits of lower cost prescriptions if Santiam chooses to affiliate with Samaritan Health Services?

A: Yes, our pharmacy on-site will continue to be accessible for employees and their families, we will continue to provide transparent communication throughout and will provide updated information as it becomes available.

Q: Is there a program of Samaritan Health Services for incentivizing health, wellness, and volunteerism that Santiam will adopt if they choose to affiliate?

A: Samaritan Health Services has a program called Healthy Habit Incentives via their health plan. Regarding volunteering, it is rewarded via recognition and the good being done in their communities, there is not a specific incentive program to volunteer, it is an expectation ingrained in their culture much like Santiam transitioned to this last year.

Q: Will Santiam Hospital & Clinics and Samaritan Health Services Leadership be hosting a joint staff forum?

A: Yes, Samaritan Health Services Leadership is looking forward to hearing more from Santiam Hospital & Clinics employees. Stay tuned for an invite.

Q: Will Santiam Hospital & Clinics adopt the pay schedule of Samaritan Health Services, and will seniority be transferred?

A: As we go through the integration process, we will learn more about how longevity and pay schedules will transition over, we are committed to transparent communication and will update when more information becomes available.

Q: Will Santiam Hospital & Clinics current health insurance, Consociates change to Samaritan's Health Insurance Plan?

A: Yes, Santiam Hospital & Clinics will no longer have Consociates if we become part of Samaritan Health Services. We would have Samaritan's Health Insurance Plan.

Q: When will staff of Santiam Hospital & Clinics be trained on the Samaritan Epic?

A: This process will take a year if we choose to affiliate. We are aiming to transition to Samaritan Epic in April 2025.

Q: Most importantly, will the Foundation's Dodgeball Tournament still be held?

A: Definitely, yes!

Additional FAQs updated 7/2/24

Q. Will Samaritan Health Services support and maintain employing Licensed Nurse Practitioners (LPNs) at Santiam Hospital & Clinics?

A. Samaritan Health Services supports and employes LPNs throughout the hospital systems and is committed to retaining Santiam Hospital & Clinics LPNs.

Q. Does Samaritan Health Services have Community Health Workers as part of their model of care addressing social determinants of health?

Updated 7/2/24

A. Yes, as part of the Traditional Health Worker program, Community Health Workers are employed by the Samaritan Health Plan throughout the Samaritan Health Services system of care. We believe in assisting members in their communities by providing physical, social, and behavioral health services.

Employee Survey

DASHBOARD



This dashboard includes responses to the Employee survey sent in response to the announcement of Samiam Hospital & Clinics working towards a possible affiliation with Samaritan Health Services. It includes converted answers to the excitement levels of staff, and to the belief levels of staff in leadership's decision to pursue this affiliation.

Scores are assigned a value as:

- Strongly Disagree - 0
- Disagree - 1
- Neutral - 2
- Agree - 3
- Strongly Agree - 4

154

Surveys Submitted

97

Comments Made

Link to Resources



Summary Metrics



Survey Intake

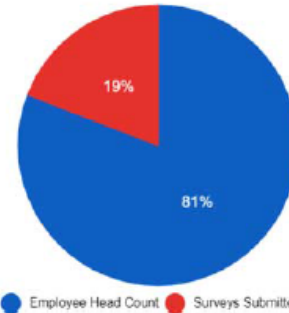


Comments Report

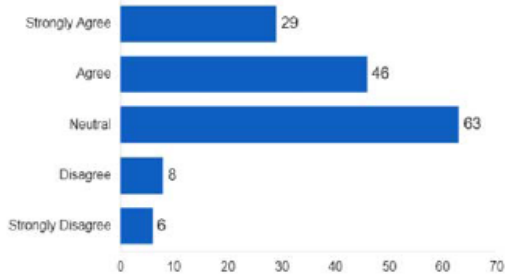


Strength in Beliefs

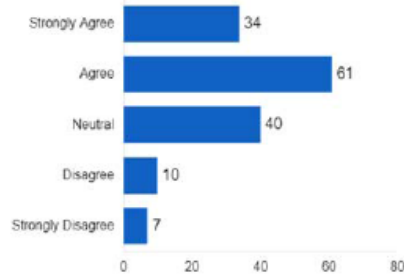
Surveys Submitted vs Company Head Count



Overall Impression of Affiliation



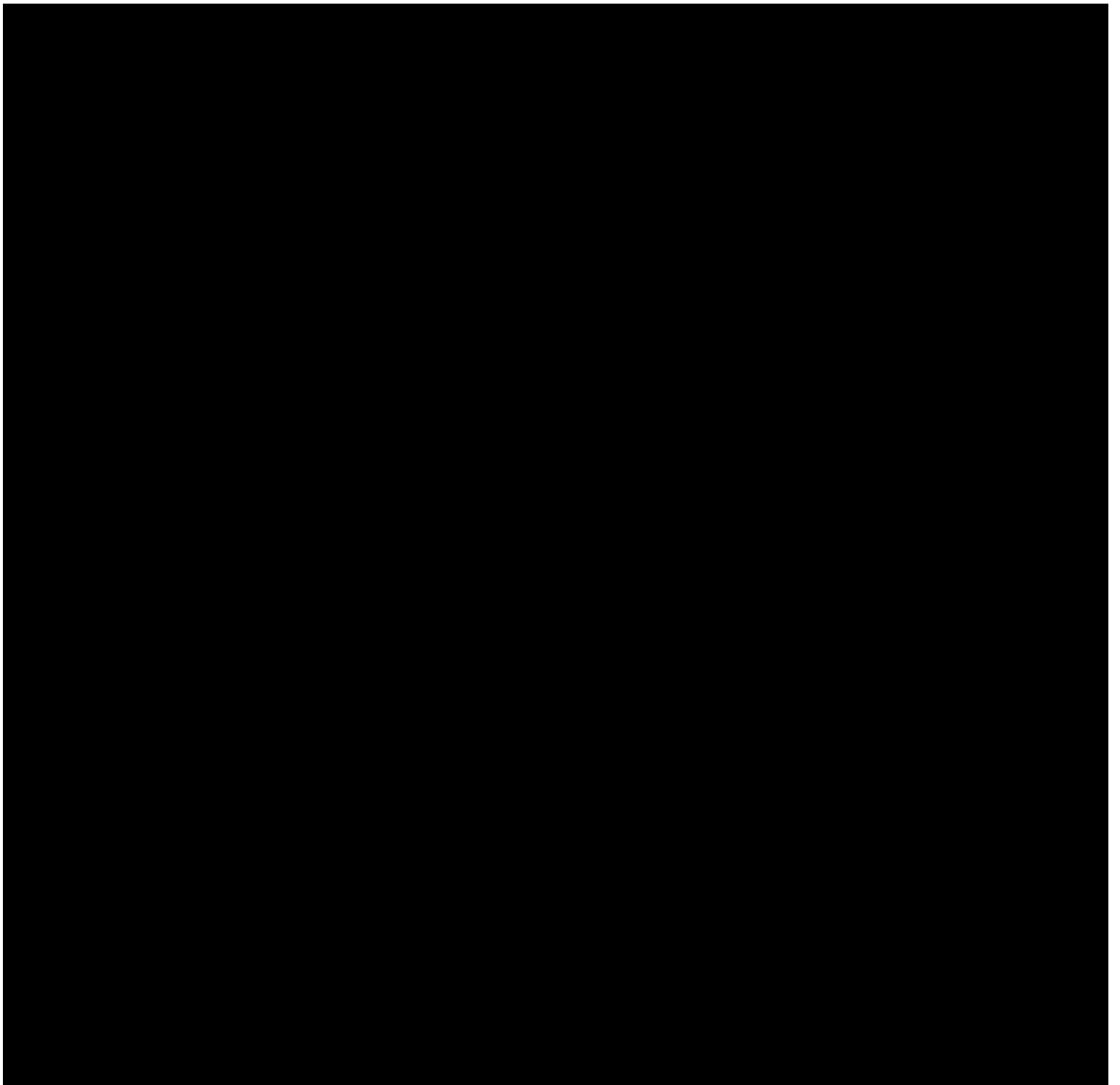
Strength in Beliefs

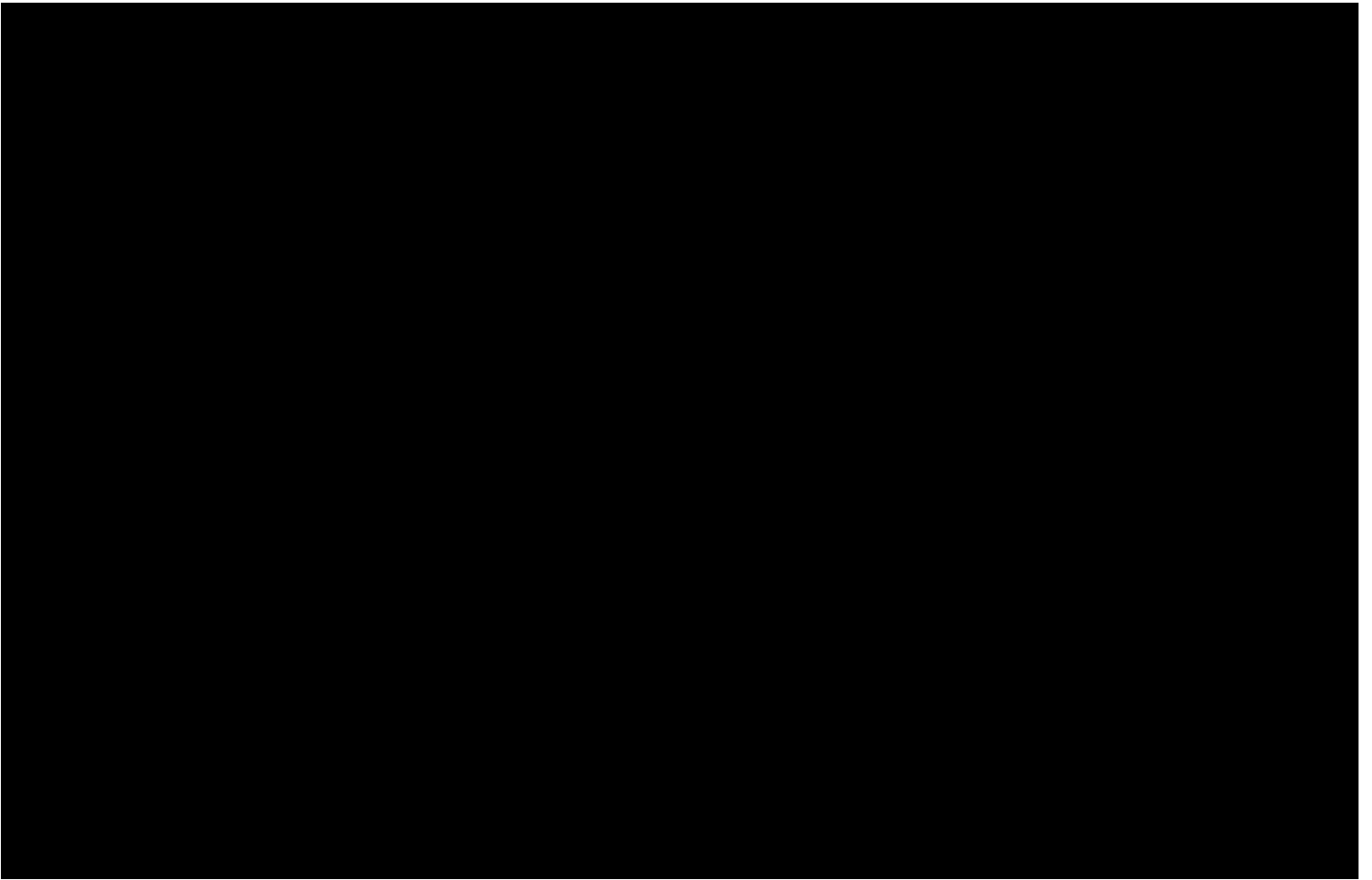


Ways to Engage

- 18**
Teams Forum
- 10**
In-Person Forums
- 32**
Email
- 2**
Pulse Notification
- 90**
All of the Above









11/15/24

Regarding: Verbal Feedback received on Santiam Hospital & Clinics pursuit to Affiliation with Samaritan Health Services

Overall, the pulse in the community is supportive of the pursuit to affiliation. Community members have been able to email Santiam at forwardtogether@santiamhospital.org or attend Community Town Halls. In addition, Santiam has a strong community presence through our Integrated Health and Outreach program and staff have been available at chamber meetings, service integration meetings, and outreach events. The feedback is generally supportive of the hospital, and they have appreciated the avenues to communicate with Santiam on the affiliation pursuit. There is excitement around the possibility of expanded services this will bring to our Santiam Region, at the same time there are questions we have been able to listen to and respond to.

Questions have ranged from “Will the hospital name remain Santiam” to will wait times to see a provider be longer after the affiliation” to “Can I see my Dr. I have now or will that be changing?” Stakeholders in Turner, OR had concerns that affiliations can be a disruption and how will that affect the longer-term goal of establishing a clinic in Turner. Community members had questions around Santiam retaining local governance and there is a genuine relief/enthusiasm when community members hear that Santiam will retain their local governance board. Donors in the community who give to our Santiam Hospital & Clinics Foundation were wondering if the donations raised in the canyon would remain in the canyon. They were relieved to hear that the Foundation will remain in place with donations staying in the communities of Santiam. Additionally, patients are interested if Santiam will be part of Samaritan EMR and will the staff they have gotten to know over time be retained throughout the affiliation process.

The trending topic by many community members at outreach events and phone calls is around UnitedHealthcare and Kaiser Insurance. It is known that Samaritan Health Services does not currently have a contract with UnitedHealthcare or Kaiser Insurance and this worries Santiam’s patients specifically the aging adult population. Santiam Hospital & Clinics has been consistent with messaging the following: *“Throughout the affiliation process, there will be no changes to the health plans that contract with Santiam Hospital & Clinics as a result of affiliation. After integration is complete and the two organizations merge – anticipated for spring 2025 – existing contracts will be evaluated. There will be no contract terminations due to affiliation in 2025. Any contract changes that may occur for 2026 would be communicated in advance of the open enrollment period.*

Santiam’s email forwardtogether@santiamhospital.org, public FAQs will remain available to the public at [Forward Together - Samaritan Health Services](#). As Santiam receives questions we will continue to listen and respond.

From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: [External]Hello!
Date: Friday, November 15, 2024 7:33:48 AM

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Brandy O'Bannon <bobannon@samhealth.org>
Sent: Wednesday, May 22, 2024 11:39 AM
To: Melissa Baurer <mbaurer@santiamhospital.org>; Kimberly Dwyer <kdwyer@santiamhospital.org>
Subject: [External]Hello!

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Good morning,

Just wanted to reach out after the announcement this am. I look forward to any opportunities to work more closely with both of you in the future! I follow the Santiam SIT and associated programs closely and am so impressed with all the fantastic partnerships you have in the community.

Have a great day,
Brandy

Brandy O'Bannon (she, her, hers)
Executive Director, Lebanon Community Hospital Foundation
Samaritan Health Services
525 Santiam Hwy | Lebanon, OR 97355
P 541-451-7063 | C 503-910-9010 | bobannon@samhealth.org

www.samhealth.org/givelchf

Give a gift that keeps on growing! Gifts to the Healing Garden Endowment are being doubled by a generous donor this year. Help sustain our three Hoichi Kurisu gardens in Lebanon.



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From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: Santiam Hospital and Clinics follow up
Date: Friday, November 15, 2024 7:36:52 AM
Importance: High

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Melissa Baurer
Sent: Wednesday, May 22, 2024 4:49 PM
To: Shayla Escudero <Shayla.Escudero@lee.net>
Subject: Santiam Hospital and Clinics follow up
Importance: High

Shayla

Thanks for chatting with me!

We chose to pursue affiliation with Samaritan Health Services, with thorough research into health care organizations, leadership identified that both organizations are well matched in their health care services, vision, mission, and cultural alignment.

In response to your finance question:

As we know, the healthcare environment is continuously changing; as a result, partnerships have become more important than ever. Partnerships and collaboration are the models of providing exceptional healthcare now and into the future. A symbiotic partnership will allow us to maintain our services and continue to pivot and grow to meet our community's needs.

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: [Melissa Baurer](#)
To: [James Day](#)
Subject: RE: [External]Re: Santiam Hospital & Clinics and Samaritan Health Services announce plans to pursue an affiliation
Date: Wednesday, May 22, 2024 3:45:00 PM
Attachments: [Our Town Responses 5-22-24.pdf](#)

Here you go James!

Thank you.

Melissa

Melissa Baurer, MA
Director, Integrated Health and Outreach
Santiam Hospital and Clinics
(503) 769-9319 | mbaurer@santiamhospital.org

ScreenShot002



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From: James Day <james.d@mtangelpub.com>
Sent: Wednesday, May 22, 2024 11:18 AM
To: Melissa Baurer <mbaurer@santiamhospital.org>
Subject: [External]Re: Santiam Hospital & Clinics and Samaritan Health Services announce plans to pursue an affiliation

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Melissa:

Greetings. Jim Day with Our Town here. Hope you are well. Thanks for the release on the Samaritan issue. I am guessing that there is not much more you can say at this point, but I do have a couple of questions.

How long have the hospital and Samaritan been talking about the idea and what led to

the discussions beginning?

What are the potential benefits of a formal affiliation for Santiam Hospital's patients and the community it currently serves?

Is it possible that an affiliation with Samaritan might be a value-added proposition for your customers in that Samaritan might be able to offer a service or procedure that Santiam Hospital does not ... and thus it would give your patients more options?

Is there any sense how long the discussion process might take?

The release notes that a "definitive agreement" might require regulatory review? Who would conduct such a review and what might the issues be?

Can we get a copy of the nonbinding letter-of-intent between the two parties?

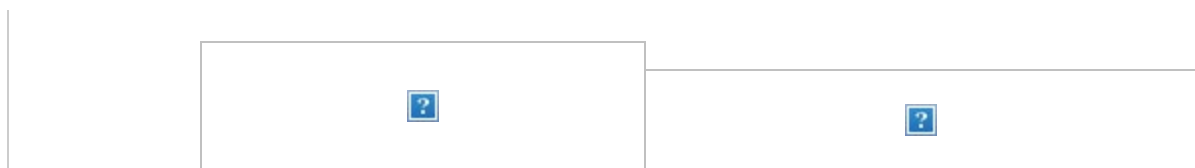
Is there anything you would like to add at this point?

No super rush. I likely will not write my story until Tuesday, 28th.

Best

James Day
Reporter
Mt. Angel Publishing/Our Town/The Canyon Weekly
Email: james.d@mtangelpub.com
Cell: 503-385-5920
Office: 503-845-9499
Twitter: @jameshday

On Wed, May 22, 2024 at 10:10 AM Melissa Baurer <mbaurer@santiamhospital.org> wrote:



Media contacts

Melissa Baurer, MA
Director, Integrated Health & Outreach Santiam Hospital &
Clinics mbaurer@santiamhospital.org
503-706-6642

Kimberly Schauer, MBA
VP, Marketing & Communications Samaritan Health Services
kschauer@samhealth.org

For immediate release

Samaritan Health Services and Santiam Hospital & Clinics announce plans to pursue an affiliation

Corvallis, Ore., May 22, 2024 – Samaritan Health Services and Santiam Hospital & Clinics announced today their plan to pursue formal affiliation. The organizations have signed a nonbinding letter of intent (LOI) to allow the parties to further evaluate the affiliation with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

“We are excited about working more closely with the team at Santiam Hospital & Clinics as we move into this next phase of our collaboration,” said Doug Boysen, president and chief executive officer of Samaritan Health Services. “Throughout our discussions, it has been clear that the alignment of our organizations – our missions, values and culture – positions us well to strengthen services across the region for those in our communities.”

“We are focused on serving our respective communities and learning from each other. Our shared strengths position us well for continued vitality so we both remain long-lasting institutions,” said Maggie Hudson, president and chief executive officer of Santiam Hospital & Clinics. “Looking toward this process, I’m driven by the relationships we are forging between our organizations, leaders and clinicians in order to better serve our communities.”

As nonprofit, community-based health systems with similar missions, visions, values and cultures, both organizations share a commitment to keeping services local. Joining together through affiliation would strengthen both organizations through increased access to services, improving health equity and enhancing services provided to communities throughout the mid-Willamette Valley and central Oregon coast regions.

“The health care industry is evolving, and we believe that this affiliation will ensure that Samaritan Health Services and Santiam Hospital & Clinics both remain sustainable, strong institutions, providing access to quality health care,” said Boysen.

The organizations are committed to maintaining local governance and leadership and retaining existing staff and clinicians.

“To fulfill our mission, we will need the contributions of our talented and dedicated staff and clinicians; and we know that bringing together expertise from both systems will enhance our respective operations and services,” said Hudson.

Samaritan Health Services and Santiam Hospital & Clinics will work toward coming to terms on a definitive agreement in the coming months. The affiliation may be subject to regulatory review.

Samaritan Health Services

Samaritan Health Services is a nonprofit regional health system that brings together five community hospitals, more than 100 physician clinics and multiple health insurance plans to serve more than 290,000 residents in Oregon’s Benton, Lincoln and Linn counties.

Samaritan employs more than 6,000 workers, including 620 clinicians, and is governed by a volunteer board, which includes community members, physicians and hospital leaders. samhealth.org

Santiam Hospital & Clinics

Santiam Hospital & Clinics is also a nonprofit health care organization,

governed by a volunteer board of directors. Santiam Hospital & Clinics is comprised of an independent, acute-care hospital in Stayton, Oregon, operating 11 clinics serving the Santiam Canyon in Marion and Linn counties. Santiam Hospital & Clinics serves more than 40,000 residents and employs more than 600 staff, including 70 medical staff who are committed to excellence in community-based care. santiamhospital.org

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Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org

ScreenShot002



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Melissa

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5-22-24
Our Town
Media Inquiry Responses

Regarding: Santiam Hospital & Clinics and Samaritan Health Services Announce their plan to pursue affiliation.

How long have the hospital and Samaritan been talking about the idea and what led to the discussions beginning?

Santiam Hospital & Clinics Leadership have been in discussions with Samaritan Health Services for some time. We have always had a good relationship with Samaritan Health Services and align well with each other.

What are the potential benefits of a formal affiliation for Santiam Hospital's patients and the community it currently serves?

“This potential affiliation is a strategic shift to secure a better future for the patients served by Santiam Hospital & Clinics. It is our commitment to strengthen this long-lasting health care system to be here to serve the residents of the Santiam Canyon, not just for today or tomorrow, but for decades to come.”- Maggie Hudson, CEO and President of Santiam Hospital & Clinics.

Is it possible that an affiliation with Samaritan might be a value-added proposition for your customers in that Samaritan might be able to offer a service or procedure that Santiam Hospital does not ... and thus it would give your patients more options?

We have more questions than answers currently, as we are in the exploration phase. In the near term, there should be no change to patient care as a result of this portion of the process. Both of our missions' center on providing care for our communities, and that remains our priority.

Is there any sense how long the discussion process might take?

Complete affiliation could take up to a year or more.

The release notes that a "definitive agreement" might require regulatory review? Who would conduct such a review and what might the issues be?

If, as we navigate through all stages of the affiliation process, both Samaritan Health Services and Santiam Hospital & Clinics ultimately decide to pursue a formal integration, a definitive agreement would be signed, and we will request review from OHA's Health Care Market Oversight program.

Can we get a copy of the nonbinding letter-of-intent between the two parties?
Not at this time, we need to work through other items first with Oregon Health Authority.

Is there anything you would like to add at this point?

“In honoring our community founders, we remain committed to local governance, local leadership, and provider-driven clinical quality. Through thoughtful and thorough assessment, it is clear Samaritan Health Services, built upon these same guiding principles, is the right partner for us. Their mission, vision, values, and culture directly align with those of Santiam Hospital & Clinics. Together, we can do more good – for our patients, our communities and our staff.” Maggie Hudson, CEO and President of Santiam Hospital & Clinics.

From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: We Love Santiam Hospital!
Date: Friday, November 15, 2024 7:38:13 AM
Attachments: [image001.png](#)
[Community Town Hall Flyer.pdf](#)

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Zuzana Holcova <zholcova@santiamhospital.org>
Sent: Friday, May 31, 2024 10:54 AM
To: B Dowding <bdowding@peak.org>
Subject: RE: We Love Santiam Hospital!

Dear Brice and Susan,

On behalf of Santiam Hospital & Clinics, thank you for taking the time to send in your valuable feedback and thoughts regarding our announcement of pursuing affiliation with Samaritan Health Services. We are so happy to hear that you have had great experiences with our hospital and clinics. As Santiam Hospital & Clinics and Samaritan Health Services pursue affiliation, patients should not experience any changes in how their care is delivered. Our focus remains on continuing to provide the quality care you have come to expect and deserve. We hear your concerns, and please stay engaged in the process. We will be hosting three Community Town Halls in the month of June (a flyer with details is attached). We hope you can make one of them. If you have any questions or feedback, please reach out to us at forwardtogether@santiamhospital.org.

Thank you again Brice and Susan for taking the time to voice what matters to you.

Sincerely,

Zuzana

Zuzana Holcová

Administrative Assistant

Santiam Hospital & Clinics

(503) 769-2175 | zholcova@santiamhospital.org

<https://santiamhospital.org/>

<https://www.facebook.com/SantiamHospitalOregon/>



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From: B Dowding <bdowding@peak.org>
Sent: Tuesday, May 28, 2024 9:39 AM
To: Zuzana Holcova <zholcova@santiamhospital.org>
Cc: bdowding <bdowding@peak.org>
Subject: [External]We Love Santiam Hospital!

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We were distraught, yesterday, to read that Santiam Medical is likely to be taken over by "The One" swallowing everyone up, Samaritan. We left Samaritan (as have many other folks), to get away from their lack of....everything, their short 15-minute visits, their enforced woke agenda and a million other things. I imagine the money is talking so the little people (us) have no input, but, if we did, we would say PLEASE DON'T. You guys are voted the 'best of everything,' according to your website and we agree! Your doctors, I'm sure, will be happier if you don't let this thing happen. We don't want the quality of our care to go down-and we don't know where we would flee to. We just had to voice our thoughts. We appreciate your hearing us.
Brice and Susan Dowding

From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: [External]proposed 2005 elimination of Kaiser and United Health care
Date: Friday, November 15, 2024 7:39:51 AM

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Forward Together
Sent: Wednesday, July 10, 2024 3:10 PM
To: Louise Wiltsey <louisewiltsey@yahoo.com>
Cc: Forward Together <ForwardTogether@santiamhospital.org>
Subject: RE: [External]proposed 2005 elimination of Kaiser and United Health care

Good afternoon, Louise,

Thank you for emailing us your concerns and thank you for trusting your care with Santiam Hospital & Clinics.

We appreciate that you choose Santiam as your choice of hospital.

We had three community town halls, and the local paper attended the town hall discussion in Stayton. United Healthcare and Kaiser insurance was a topic that many community members at the Stayton Town Hall had. Community members wanted to know if Santiam Hospital & Clinics would continue to take United Healthcare and Kaiser insurance as the other hospitals/clinics within Samaritan Health Services do not at this time. We communicated during the townhall that there would be changes to health plans via December 2025 as a result of the affiliation and that in the meantime we would be evaluating how to proceed and would give ample notification if anything was to change in 2026. Unfortunately, the paper reported it differently but did make an online correction.

Here is the corrected information, “ *Throughout the affiliation process, there will be no*

changes to the health plans that contract with Santiam Hospital & Clinics as a result of affiliation. After integration is complete and the two organizations merge – anticipated for spring 2025 – existing contracts will be evaluated. There will be no contract terminations due to affiliation in 2025. Any contract changes that may occur for 2026 would be communicated in advance of the open enrollment period.

Input like yours, Louise is valuable for our team as we continue to pursue affiliation with Samaritan Health Services. I want to thank you again for sharing your concerns. Your voice matters as we move forward in pursuit of affiliation.

Sincerely,

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Louise Wiltsey <louisewiltsey@yahoo.com>

Sent: Tuesday, July 9, 2024 10:43 AM

To: Forward Together <ForwardTogether@santiamhospital.org>

Subject: [External]proposed 2005 elimination of Kaiser and United Health care

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As reported in the Stayton area newspaper, Santiam Hospital and Clinics are considering canceling Kaiser and United Health care from accepted medical insurance at Santiam Hospital.

How many patients do you think this will affect? As for myself, I've been with Kaiser for 30+ years. Besides a primary provider I have a numerous specialty providers. How do you expect patients to move all this? Labs? Radiology?

I live the Santiam Hospital community. I have Kaiser health insurance.

I was seen recently for an emergent ED visit. The only other choice would have been a half hour ride to Salem Health. I chose Santiam Hospital.

Removing Kaiser and United Health can't possibly improve your bottom line or community

approval.

Why was this information published in the local newspaper if it's only be considered?

From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: [External]Kaiser/United Health elimination
Date: Friday, November 15, 2024 7:40:32 AM

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Louise Wiltsey <louisewiltsey@yahoo.com>
Sent: Thursday, July 11, 2024 11:09 AM
To: Forward Together <ForwardTogether@santiamhospital.org>
Subject: [External]Kaiser/United Health elimination

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I have also filed a formal complaint with Kaiser about the proposed elimination of Kaiser and United Health care from Santiam Hospital. Proposed 2025-2026.
Louise Wiltsey

From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: [External]2025-2026 Kaiser/United Health exclusions from Santiam Hospital
Date: Friday, November 15, 2024 7:40:42 AM

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Melissa Baurer <mbaurer@santiamhospital.org>
Sent: Friday, July 12, 2024 4:35 PM
To: Louise Wiltsey <louisewiltsey@yahoo.com>; Forward Together <ForwardTogether@santiamhospital.org>
Subject: RE: [External]2025-2026 Kaiser/United Health exclusions from Santiam Hospital

Louise, thank you for your input. We do appreciate your feedback and understand your concern. As mentioned there will be no changes to the health plans Santiam currently contracts within 2025. As we move through the affiliation process, we will continue to provide timely and transparent updates.

Thank you and have a good weekend.

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Louise Wiltsey <louisewiltsey@yahoo.com>
Sent: Thursday, July 11, 2024 11:00 AM
To: Forward Together <ForwardTogether@santiamhospital.org>
Subject: [External]2025-2026 Kaiser/United Health exclusions from Santiam Hospital

CAUTION-EXTERNAL: This email originated from outside the organization. Do not click links or open attachments unless you validate the sender and know the content is safe. Please forward this email to helpdesk@santiamhospital.org if you believe this email is suspicious.

2025-2026 is closer than you think.

Santiam Hospital's transparent decision will not be transparent to patients that find themselves without health care insurance accepted by their hospital.

This could be a catastrophic life event for Kaiser/United Health Care and Santiam Hospital patients.

Make a humanitarian choice that will benefit the community, not just Santiam Hospital's bottom line.

Patients will remember this moment of doing the right thing

Louise Wiltsey.

From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: A few inquiries
Date: Friday, November 15, 2024 7:40:57 AM

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Forward Together <ForwardTogether@santiamhospital.org>

Sent: Monday, July 22, 2024 5:35 PM

To: Shannon Waddle <swaddle@santiamhospital.org>

Cc: Forward Together <ForwardTogether@santiamhospital.org>

Subject: RE: A few inquiries

Shannon,

First apologies for the delayed response and it was nice seeing you today! I put the responses to your questions in red below.

Q: I am certain that not all positions in our organization will directly align with Samaritan's job descriptions. How will that transition work? Will H/R be working with staff to find a job description best suited to them, give staff time to make changes in their daily jobs to meet the expectation of those jobs? Often times at Santiam we have just modified duties to meet the needs within the organization, which is great, but might not directly align.

- **A workgroup will be convened to crosswalk all positions between Samaritan and Santiam to assess any gaps and develop a plan.**

How will this affect our Rural Health Clinics? Will our reimbursement rate change? Will there be a change in our status as an RHC?

- **Rural health clinics credentialing, and reimbursement are based on meeting specific federal criteria. This affiliation should have no impact.**

Will our Policies and procedures change to Samaritan's exclusively?

- **Yes, we can anticipate alignment wherever possible with the Samaritan System of Policies and Procedures**

So hopeful they have electronic signature options within the EMR for documents??!!

- **Yes, Samaritan has electronic signature options, as we move forward with workgroups we will find more information out.**

Please let us know if you have any other questions.

Thank you,

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Shannon Waddle <swaddle@santiamhospital.org>

Sent: Thursday, June 6, 2024 4:30 PM

To: Forward Together <ForwardTogether@santiamhospital.org>

Subject: A few inquiries

I am certain that not all positions in our organization will directly align with Samaritan's job descriptions. How will that transition work? Will H/R be working with staff to find a job description best suited to them, give staff time to make changes in their daily jobs to meet the expectation of those jobs? Often times at Santiam we have just modified duties to meet the needs within the organization, which is great, but might not directly align.

How will this affect our Rural Health Clinics? Will our reimbursement rate change? Will there be a change in our status as a RHC?

Will our Policies and procedures change to Samaritan's exclusively?

So hopeful they have electronic signature options within the EMR for documents??!!

Thanks for the opportunity to ask questions. I understand you may not know these answers!

Shannon Waddle

Office Manager

Santiam Medical Clinic

X 5104

PH: 503-897-4100

FAX: 971-315-0765

swaddle@santiamhospital.org



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From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: Follow up on Inquiry
Date: Friday, November 15, 2024 7:41:11 AM

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: Forward Together <ForwardTogether@santiamhospital.org>

Sent: Monday, August 12, 2024 1:05 PM

To: logsonthelake@gmail.com

Cc: Forward Together <ForwardTogether@santiamhospital.org>

Subject: Follow up on Inquiry

Good afternoon, Karen,

Your email regarding access to a specialist was forward to us from Customer Service.

We thank you for your interest in our pursued affiliation with Samaritan Health Services. If Santiam Hospital & Clinics was to become part of Samaritan Health Services, patients will have access to the Samaritan Health System of Care and continued access to providers in other areas like Salem. Your primary and orthopedic office will be able to connect you to the care you need.

Thank you again for contacting us. For more FAQs please visit: [Forward Together - Samaritan Health Services \(samhealth.org\)](https://www.samhealth.org)

Any additional questions you may send to forwardtogether@santiamhospital.org

Have a wonderful day!

Melissa

Melissa Baurer, MA

Director, Integrated Health and Outreach

Santiam Hospital and Clinics

(503) 769-9319 | mbaurer@santiamhospital.org



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From: [Melissa Baurer](#)
To: [Yadira Gutierrez](#)
Subject: FW: Patient info for UHC
Date: Friday, November 15, 2024 7:41:49 AM
Attachments: [image001.png](#)

Melissa

Melissa Baurer, MA
Director, Integrated Health and Outreach
Santiam Hospital and Clinics
(503) 769-9319 | mbaurer@santiamhospital.org



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From: Cassandra Posvar <cposvar@santiamhospital.org>
Sent: Tuesday, October 1, 2024 8:56 AM
To: Admitting <admitting@santiamhospital.org>
Cc: Christopher Grinstead <cgrinstead@santiamhospital.org>; Melissa Baurer <mbaurer@santiamhospital.org>
Subject: Patient info for UHC

Hi there,

We received an e-mail from our UHC contract rep stating that a patient contacted them with concerns that Santiam would not be taking UHC next year. The e-mail states that:

Apparently the member was checking on their infusion treatment for osteoporosis which is when she received the info. I am not familiar with the hospital but the member walked in the main doors, went up a flight a stairs and was told this info by the staff behind the desk at the top of the stairs.

We have said this a few times, but I want to make sure that we are telling the patients accurate information. We will have no change to the UHC contract at a minimum through the end of 2025. At the time the affiliation becomes finalized is when Santiam and Samaritan will be able to start having discussions to make decisions around UHC.

For patients to keep apprised of any updates they can go to our Santiamhospital.org website and click on the affiliation link for the FAQ's that we are working to keep updated.

Please make sure that you are not telling anyone that we won't be taking UHC as this is not something that we are even able to have a conversation with Samaritan around yet. If you have any specific questions please let me know.

Cassandra Posvar Martinez
Director of Revenue Cycle
Santiam Hospital
503-769-9255 cposvar@santiamhospital.org



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Day	Time	SHS Communicator	Stakeholder Group	Communication Tactic	Stakeholder Detail	Communication Materials:	Estimate Number of Attendees
20-May	1:10 PM	Doug Boysen	SHS Board	E-mail	Providing SHS Board with final press release, talking points, timeline	Press release, board talking points, 50 day plan	15
20-May	4:00 PM	Doug Boysen	SEC	Teams Meeting		Press release, exec talking points, 50 day plan	19
21-May	1-5 p.m.	Marty Cahill	Board Chair	Phone Call	SNLH Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Marty Cahill	Board Chair	Phone Call	SPHS Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Wendie Wunderwald	Board Chair	Phone Call	MVH Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Dan Keteri	Board Chair	Phone Call	SAGH Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Laura Hennum	Board Chair	Phone Call	GSR Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Taylor Gilmour	Board Chair	Phone Call	NLH Foundation Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Taylor Gilmour	Board Chair	Phone Call	PCHD Foundation Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Taylor Gilmour	Board Chair	Phone Call	LCH Foundation Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Taylor Gilmour	Board Chair	Phone Call	AGH Foundation Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Taylor Gilmour	Board Chair	Phone Call	GSR Foundation Board Chair	Exec Talking Points	1
21-May	1-5 p.m.	Tyler Jacobsen	OHA HCMO	Phone Call	OHA Health Care Mergers Office	Press Release	4
22-May	7:30-8 am	Bob Turngren	SMG Exec Team	Teams Meeting	Meeting with SMG Exec Team re: Affiliation	Exec Talking Points	17
22-May	7:30-8 am	Marty Cahill	Medical Staff President	Phone Call	SNLH, Medical Staff President	Exec Talking Points	1
22-May	7:30-8 am	Marty Cahill	Medical Staff President	Phone Call	SPCH, Medical Staff President	Exec Talking Points	1
22-May	7:30-8 am	Wendie Wunderwald	Medical Staff President	Phone Call	SLCH, Medical Staff President	Exec Talking Points	1
22-May	7:30-8 am	Daniel Keteri	Medical Staff President	Phone Call	SAGH, Medical Staff President	Exec Talking Points	1
22-May	7:30-8 am	Laura Hennum	Medical Staff President	Phone Call	GSRMC, Medical Staff President	Exec Talking Points	1
22-May	8:10 AM	Doug Boysen	SHS All Mail Users	E-mail	All Samaritan Health Services Employees	All User Communication	6000+
22-May	8:10 AM	Kimberly Schauer	All Staff	Well Informed	Post well informed article on SHS Insider for all SHS staff	Well Informed Article	6000+
22-May	8:15 AM	Doug Boysen	SHS All Board	E-mail	All Samaritan Health Services Hospital & Foundation Board Members	All Board Communication	173
22-May	8:15-10 AM	Doug Boysen	Key Partner	Phone Call	Providence Health & Services	Exec Talking Points	1
22-May	8:15-10 AM	Doug Boysen	Key Partner	Phone Call	Hospital Association of Oregon	Exec Talking Points	1
22-May	8:15-10 AM	Doug Boysen	Key Partner	Phone Call	OSU Athletics	Exec Talking Points	1
22-May	8:15-10 AM	Doug Boysen	Key Partner	Phone Call	OSU	Exec Talking Points	1
22-May	8:15-9 am	Marty Cahill	Public Official	Phone Call	Lincoln County Commissioner	Exec Talking Points	1
22-May	8:15-9 am	Marty Cahill	Public Official	Phone Call	Linn County Commissioner	Exec Talking Points	1
22-May	8:15-9 am	Laura Hennum	Public Official	Phone Call	Benton County Commissioner	Exec Talking Points	1
22-May	8:15-9 am	Daniel Keteri	Public Official	Phone Call	Representative	Exec Talking Points	1
22-May	8:30 AM	Michelle Linton	Joint Managers	Meeting Invite	Samaritan Leadership Meeting, Managers - SVPs	Outlook Invite	400+ invited
22-May	9:00 AM	Bob Turngren	SMG Clinicians	Email	Email to SMG clinicians & email to SMG Leadership council	Email	500+
22-May	9:00 AM	Taylor Gilmour	Major Donors	Email	Individual outreach to key donors	Stakeholder Communication	6
22-May	9:00-10:00 am	Kelley Kaiser	Key Partner	Phone Call	Gallagher	Exec Talking Points	1
22-May	9:00-10:00 am	Kelley Kaiser	Key Partner	Phone Call	OSU	Exec Talking Points	1
22-May	9:00-10:00 am	Kelley Kaiser	Key Partner	Phone Call or Email	OSU	Exec Talking Points	1
22-May	9:00-10:00 am	Kelley Kaiser	Key Partner	Phone Call or Email	OSU	Stakeholder Communication	1
22-May	9:00-10:00 am	Kelley Kaiser	Key Partner	Phone Call or Email	OSU	Stakeholder Communication	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	KPMG	Exec Talking Points	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	S&P	Exec Talking Points	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	KeyBank	Exec Talking Points	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	Saalfeld Griggs	Exec Talking Points	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	RVK	Exec Talking Points	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	PFM	Exec Talking Points	1
22-May	9:00-10:00 am	Dan Smith	Key Partner	Phone Call	PJC	Exec Talking Points	1
22-May	9:00-10:00 am	Marty Cahill	Community Stakeholders	Phone Call or Email	Pacific Communities Health District Board Chair	Stakeholder Communication	1
22-May	9:00-10:00 am	Marty Cahill	Community Stakeholders	Phone Call or Email	North Lincoln Health District Board Chair	Stakeholder Communication	1
22-May	9:00-10:00 am	Marty Cahill	Key Partner	Phone Call or Email	COMP-NW	Exec Talking Points	1
22-May	9:00-10:00 am	Marty Cahill	Community Stakeholders	Phone Call or Email	Central Willamette Credit Union	Exec Talking Points	1
22-May	9:00-10:00 am	Marty Cahill	Key Partner	Phone Call or Email	Oregon Coast Community College	Stakeholder Communication	1
22-May	9:00-10:00 am	Marty Cahill	Key Partner	Phone Call or Email	Lincoln County Health Department	Stakeholder Communication	1
22-May	9:00-10:00 am	Marty Cahill	Key Partner	Phone Call or Email	Corvallis Radiology	Stakeholder Communication	1
22-May	9:00-10:00 am	Marty Cahill	Key Partner	Phone Call or Email	Mid-Valley Gastro	Stakeholder Communication	1
22-May	9:00-10:00 am	Laura Hennum	Key Partner	Phone Call or Email	Lbcc	Stakeholder Communication	1
22-May	9:00-10:00 am	Laura Hennum	Community Stakeholders	Phone Call or Email	The Corvallis Clinic	Exec Talking Points	1
22-May	9:00-10:00 am	Laura Hennum	Key Partner	Phone Call or Email	Mary's Peak Emergency Physicians	Stakeholder Communication	1

Day	Time	SHS Communicator	Stakeholder Group	Communication Tactic	Stakeholder Detail	Communication Materials:	Estimate Number of Attendees
22-May	9:00-10:00 am	Laura Hennum	Key Partner	Phone Call or Email	Valley Pathology	Stakeholder Communication	1
22-May	9:00-10:00 am	Laura Hennum	Key Partner	Phone Call or Email	Benton County Health Department	Stakeholder Communication	1
22-May	9:00-10:00 am	Laura Hennum	Community Stakeholders	Phone Call or Email	Corvallis Family Medicine	Stakeholder Communication	1
22-May	9:00-10:00 am	Laura Hennum	Community Stakeholders	Phone Call or Email	Corvallis Chamber of Commerce	Stakeholder Communication	1
22-May	9:00-10:00 am	Dan Keteri	Key Partner	Phone Call or Email	Linn County Health Department	Stakeholder Communication	1
22-May	9:00-10:00 am	Dan Keteri	Community Stakeholders	Phone Call or Email	Albany Chamber of Commerce	Stakeholder Communication	1
22-May	9:00-10:00 am	Dan Keteri	Community Stakeholders	Phone Call or Email	Boys & Girls Club of Albany	Stakeholder Communication	1
22-May	9:00-10:00 am	Wendie Wunderwald	Community Stakeholders	Phone Call or Email	Lebanon Chamber of Commerce	Stakeholder Communication	1
22-May	9:00-10:00 am	Wendie Wunderwald	Community Stakeholders	Phone Call or Email	Boys & Girls Club of Greater Santiam	Stakeholder Communication	1
22-May	9:00-10:00 am	Kelley Kaiser	Community Stakeholders	Phone Call or Email	Boys & Girls Club of Corvallis	Stakeholder Communication	1
22-May	9:00-10:00 am	Taylor Gilmour	Community Stakeholders	Phone Call or Email	United Way of LBL	Stakeholder Communication	1
22-May	9:00-10:00 am	Taylor Gilmour	Community Stakeholders	Phone Call or Email	Benton Community Foundation	Stakeholder Communication	1
22-May	9:00-10:00 am	Taylor Gilmour	Community Stakeholders	Phone Call or Email	Coast to Cascades Community Wellness Network	Stakeholder Communication	1
22-May	9:00-10:00 am	Taylor Gilmour	Community Stakeholders	Phone Call or Email	Partnership for Community Health	Stakeholder Communication	1
22-May	9:00-10:00 am	Kelley Kaiser	Community Stakeholders	Phone Call or Email	Corvallis School District	Stakeholder Communication	1
22-May	9:00-10:00 am	Kelley Kaiser	Community Stakeholders	Phone Call or Email	Oregon State Credit Union	Stakeholder Communication	1
22-May	10:00 AM	Kimberly Schauer	Community Stakeholders	Press Release Distribution	Press release distribution to media outlets	Press Release	Multiple media outlets
22-May	10:00 AM	Kimberly Schauer	Community Stakeholders	SHS Website Update	www.samhealth.org/forwardtogether published	Press release / FAQs	External site viewable to all
22-May	10:15 AM	Kimberly Schauer	Community Stakeholders	SHS Social Media Platforms	Social Media Posts		Social media posts viewable to all
22-May	10:15 AM	Larissa Balzer	Medical Staff	Email	Press release distribution to medical staff at all Samaritan hospitals	Stakeholder Communication	500+
23-May	4:00 PM	Doug Boysen	Samaritan Leaders	Meeting	Meeting of SHS leadership tam.	JMM Presentation	250+ attended
6-Jun	8:00 - 4:00 pm	Multiple	Key Stakeholders	In Person Event	Fundraising event with 100+ key stakeholders.	No prepared materials	138
11-Jun	8:30 - 9:30 am	Doug Boysen	All SHS Staff	Employee Forum	Employee Forum re: Potential Santiam Affiliation	Employee Forum Presentation	400+ employees
19-Jun	5:30 - 7:30 pm	Multiple	SMG Exec Team & SHC Clinicians	In-Person Event	Mixer between SHC medical staff & SMG Exec Team	No prepared materials	25
25-Jun	11:30 - 2:00 pm	Doug Boysen	GSRMC Hospital Board Meeting	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
26-Jun	5:00 - 7:00 pm	Doug Boysen	SAGH Hospital Board Meeting	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
25-Jun	5:00 - 7:00 pm	Doug Boysen	SLCH Hospital Board Meeting	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
20-Jun	11:30 - 2:00 pm	Doug Boysen	SNLH Hospital Board Meeting	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
20-Jun	3:00 - 5:00 pm	Doug Boysen	SNLH Hospital Board Meeting	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
24-Jul	12:00 - 2:00 pm	Kelley Kaiser	GSH Foundation Board Meetings	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
25-Jul	12:00 - 2:00 pm	Kelley Kaiser	LCH Foundation Board Meetings	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
24-Jul	4:00 - 5:30 pm	Kelley Kaiser	NLH Foundation Board Meetings	In-Person Event	Board Meeting	Santiam Board Update - June 2024	25
29-Jul	8:00 AM	Larissa Balzer	SHS Integration Planning Leads	E-mail	Email re: launching integration planning efforts	Integration Planning Update	92
8-Aug	2:45 PM	Larissa Balzer	SHS Integration Planning Leads	E-mail	Email update on integration planning	Integration Planning Update	92
16-Sep	8:51 AM	Doug Boysen	All SHS Staff	E-mail	Monday Morning Virtual Huddle - Santiam update included	Monday Morning Virtual Huddle	6000+ employees
19-Sep	9:30 AM	Larissa Balzer	SHS Integration Planning Leads	E-mail	Email update on integration planning	Integration Planning Update	92
27-Sep	12:00 - 3:00 pm	Multiple	All SHS Board Members	Virtual Event	All Boards Retreat	All Boards Retreat System Update	170+ invited
29-Oct	8 am - 9 am	Doug Boysen	All SHS Staff	Virtual Event	All SHS employee forum, affiliation update	Employee Forum Presentation October	500+ employees

Larissa Balzer

From: Doug Boysen
Sent:

Subject: Larissa Balzer; Michelle Linton
Santiam Hospital Affiliation
Attachments: Announcement Press Release_Final.pdf; Affiliation-Board Talking Points _v2.pdf; 50 Day Plan.pdf

Good afternoon. I wanted to pass the following documents to you as SHS Board members. They are as follows:

- 1) Press release to be released at 10 am on this Wednesday.
- 2) Talking points for you in the event you are asked questions after the announcement.
- 3) The activities and milestones we are planning to reach over the next 50 days.

Note that this is highly confidential until Wednesday morning at 10 am. I will be sending an email to all Samaritan hospital and foundation board members on Wednesday morning. I will also be sending an email to all employees that morning as well. After 10 am on Wednesday it will no longer be confidential and you are free to talk openly about the potential transaction.

Please let Larissa or me know if you have any questions.

Thank you.

Doug

Samaritan & Santiam Affiliation

Executive Talking Points

Samaritan Health Services and Santiam Hospital & Clinics have announced their plan to pursue affiliation. The organizations have signed a nonbinding letter of intent and plan to further evaluate the affiliation with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

- We are excited about the possibility of Santiam Hospital & Clinics joining Samaritan Health Services.
- Affiliating with another culturally aligned, organization will give us the opportunity to evolve in new ways and remain vital as we pursue our mission of building healthier communities together.
- The two organizations share structural, cultural and community alignment.
 - Nonprofit, community-based health systems.
 - Similar mission, vision, values.
 - Commitment to local governance with community influence and oversight.
 - Service in geographically compatible communities.
 - Commitments to keeping services local, enhancing services where appropriate.
- Our alignment extends to local philanthropy as well. Donors can support local services through the Santiam Hospital & Clinics Foundation or any of the five Samaritan hospital foundations.
- As we plan how our organizations will come together, we know that leveraging the unique strengths of Samaritan Health Services and Santiam Hospital & Clinics will improve our operations and services.
- Through this process, patients should not experience any changes in how their care is delivered. Our focus remains on fulfilling our missions as nonprofit health care organizations and supporting our clinicians so they can continue providing quality care.
- We are committed to retaining employees and local governance in this process. We will need our talented and dedicated teams to continue to serve patients at the hospitals and clinics, as well as to support ongoing operations of the health system.
- This process could take up to a year to complete.
- Santiam Hospital & Clinics is a not-for-profit health care organization, governed by a volunteer board of directors. Santiam Hospital & Clinics is comprised of an independent, acute-care hospital in Stayton, Oregon operating 11 clinics serving the Santiam Canyon in Marion and Linn counties. Santiam Hospital & Clinics serves more than 40,000 residents and employ more than 600 workers, as well as more than 70 medical staff who are committed to excellence in community-based care. santiamhospital.org.
- Samaritan Health Services is a nonprofit regional health system that brings together five community hospitals, more than 100 physician clinics and multiple health insurance plans to serve more than 290,000 residents in Oregon's Benton, Lincoln and Linn counties. Samaritan employs more than 6,000 workers, including 620 clinicians, and is governed by a volunteer board, which includes community members, physicians and hospital leaders. samhealth.org
- More information, including frequently asked questions (FAQ), will be posted at samhealth.org/forwardtogether.

Samaritan & Santiam Affiliation

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- More information, including frequently asked questions (FAQ), will be posted at samhealth.org/forwardtogether.

Planning for the Next ~50 Days



Larissa Balzer

From: Doug Boysen
Sent: Wednesday, May 22, 2024 8:16 AM
To: Email All SHS
Subject: Important System Update

Good morning. I'm reaching out today to share some exciting news that will benefit both Samaritan and the communities we serve.

For the past several months, senior leadership at Samaritan Health Services and Santiam Hospital & Clinics have been discussing the possibility of partnership, what that could look like and how it would benefit our region. Now, with approval of our system board, both organizations have signed a nonbinding letter of intent (LOI) that will allow us to advance a deeper analysis of a potential affiliation, with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

As nonprofit, community-based health systems with similar missions, visions and values, both organizations share a commitment to keeping services local. Joining together through affiliation would strengthen both organizations through increased access to services, improving health equity and enhancing services provided to communities throughout the region.

Santiam Hospital & Clinics is a nonprofit health care organization, governed by a volunteer board of directors. Santiam Hospital & Clinics is comprised of an independent, acute-care hospital in Stayton, Oregon operating 11 clinics serving Marion and Linn counties. Santiam Hospital & Clinics serves more than 40,000 residents and employ more than 600 employees, as well as more than 70 medical staff who are committed to excellence in community-based care. You can learn more about Santiam Hospital & Clinics at www.santiamhospital.org.

Please note this is not a completed deal. We are moving forward with serious conversations about Santiam Hospital & Clinics joining Samaritan, but the affiliation is tentative until both parties have signed definitive documents. We expect that we could sign those final documents as early as July.

We will be announcing this news publicly at 10:00 am this morning with a press release to the local media. I ask that you please keep this confidential (within the organization) until that time.

Health care continues to be a dynamic and challenging environment. This opportunity with Santiam Hospitals & Clinics allows Samaritan to continue to evolve, grow and maintain our mission of building healthier communities together.

More information will be forthcoming on this exciting new development.

Sincerely,

Doug

Douglas R. Boysen, JD, MHA
President & CEO

Larissa Balzer

From: Doug Boysen
Sent: Wednesday, May 22, 2024 8:24 AM
To: Doug Boysen
Cc: Daniel Keteri; Dan Smith; Kelley Kaiser; Larissa Balzer; Laura Hennem; Lesley Ogden; Marty Cahill; Robert Turngren; Taylor Gilmour; Tyler Jacobsen; Wendie Wunderwald; Michelle Linton
Subject: Samaritan Health Services - Important Update
Attachments: Press Release.pdf; Board Talking Points.pdf

Good morning. I'm reaching out today to share some exciting news that will benefit both Samaritan and the communities we serve.

For the past several months, executive leadership at Samaritan Health Services and Santiam Hospital & Clinics have been discussing the possibility of partnership, what that could look like and how it would benefit our region. Now, with approval of our system board, both organizations have signed a nonbinding letter of intent (LOI) that will allow us to advance a deeper analysis of a potential affiliation, with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

As nonprofit, community-based health systems with similar missions, visions and values, both organizations share a commitment to keeping services local. Joining together through affiliation would strengthen both organizations through increased access to services, improving health equity and enhancing services provided to communities throughout the region.

Santiam Hospital & Clinics is a nonprofit health care organization, governed by a volunteer board of directors. Santiam Hospital & Clinics is comprised of an independent, acute-care hospital in Stayton, Oregon operating 11 clinics serving Marion and Linn counties. Santiam Hospital & Clinics serves more than 40,000 residents and employ more than 600 employees, as well as more than 70 medical staff who are committed to excellence in community-based care. You can learn more about Santiam Hospital & Clinics at www.santiamhospital.org.

Please note this is not a completed deal. We are moving forward with serious conversations about Santiam Hospital & Clinics joining Samaritan, but the affiliation is tentative until both parties have signed definitive documents. We expect that we could sign those final documents as early as July.

We will be announcing this news publicly at 10:00 am this morning with a press release to the local media. I ask that you please keep this confidential (within the organization) until that time.

As this becomes public, I am attaching the following information in the event you are approached by interested community members:

- 1) The final press release; and
- 2) "Talking Points" related to the transaction.

If you are approached by the media, please refer them to Kimberly Schauer, our VP of Marketing and Communications. Her contact information is on the attached press release. If you have specific

questions about the transaction, please contact Larissa Balzer, VP of Strategy and Planning at lbalzer@samhealth.org.

Health care continues to be a dynamic and challenging environment. This opportunity with Santiam Hospitals & Clinics allows Samaritan to continue to evolve, grow and maintain our mission of building healthier communities together.

More information will be forthcoming on this exciting new development.

Sincerely,

Doug Boysen, JD, MHA
President and CEO
Samaritan Health Services

Samaritan Health Services, Santiam Hospital & Clinics Announce Plans to Pursue an Affiliation

Samaritan Health Services and Santiam Hospital & Clinics have announced their plan to pursue formal affiliation. The organizations have signed a nonbinding letter of intent (LOI) to allow the parties to further evaluate the affiliation with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

“We are excited about working more closely with the team at Santiam Hospital & Clinics as we move into this next phase of our collaboration,” said Doug Boysen, president and chief executive officer of Samaritan Health Services. “Throughout our discussions, it has been clear that the alignment of our organizations – our missions, values and cultures – positions us well to strengthen services across the region for those in our communities.”

“We are focused on serving our respective communities and learning from each other. Our shared strengths position us well for continued vitality so we both remain long-lasting institutions,” said Maggie Hudson, president and chief executive officer of Santiam Hospital & Clinics. “Looking toward this process, I’m driven by the relationships we are forging between our organizations, leaders and clinicians in order to better serve our communities.”

As nonprofit, community-based health systems with similar missions, visions, values and cultures, both organizations share a commitment to keeping services local. Joining together through affiliation would strengthen both organizations through increased access to services, improving health equity and enhancing services provided to communities throughout the mid-Willamette Valley and central Oregon coast regions.

“The health care industry is evolving, and we believe that this affiliation will ensure that Samaritan Health Services and Santiam Hospital & Clinics both remain sustainable, strong institutions, providing access to quality health care,” said Boysen.

The organizations are committed to maintaining local governance and leadership and retaining existing staff and clinicians.

“To fulfill our mission, we will need the contributions of our talented and dedicated staff and clinicians; and we know that bringing together expertise from both systems will enhance our respective operations and services,” said Hudson.

Samaritan Health Services and Santiam Hospital & Clinics will work toward coming to terms on a definitive agreement in the coming months. The affiliation may be subject to regulatory review.

Resources for internal teams, including talking points, are available on the [SHS Insider](#) and frequently asked questions for our communities can be found at samhealth.org/ForwardTogether.



All News

Doug Message – to be forwarded (community stakeholders, SMG, medical staff, etc.)

I'm excited to share some news today that will positively impact health care in our region and communities.

Samaritan Health Services and Santiam Hospital & Clinics have signed a nonbinding letter of intent (LOI) that will allow us to explore a potential partnership and advance a deeper analysis of a potential affiliation, with the anticipated outcome of Santiam Hospital & Clinics becoming part of Samaritan Health Services.

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Samaritan Health Services is a nonprofit regional health system that brings together five community hospitals, more than 100 physician clinics and multiple health insurance plans to serve more than 290,000 residents in Oregon's Benton, Lincoln and Linn counties. Samaritan employs more than 6,000 employees, including 620 clinicians, and is governed by a volunteer board, which includes community members, physicians and hospital leaders. www.samhealth.org

Health care continues to be a dynamic and challenging environment. This opportunity with Santiam Hospitals & Clinics allows Samaritan to continue to evolve, grow and maintain our mission of building healthier communities together.

Sincerely,
Doug

Doug Boysen, JD, MHA
President and CEO
Samaritan Health Services

Forward Together



Samaritan
Health Services



Santiam Hospital
& Clinics
embrace HEALTH

SANTIAM AT-A-GLANCE

Our People

650+ employees

70+ employed clinicians

- From primary to specialized care

Our System

Non-profit

Integrated Delivery System

Our Facilities

One acute care hospital

- 40 beds
- Level IV trauma ER

6 primary care / rural health clinics (RHCs)

6 specialty care clinics

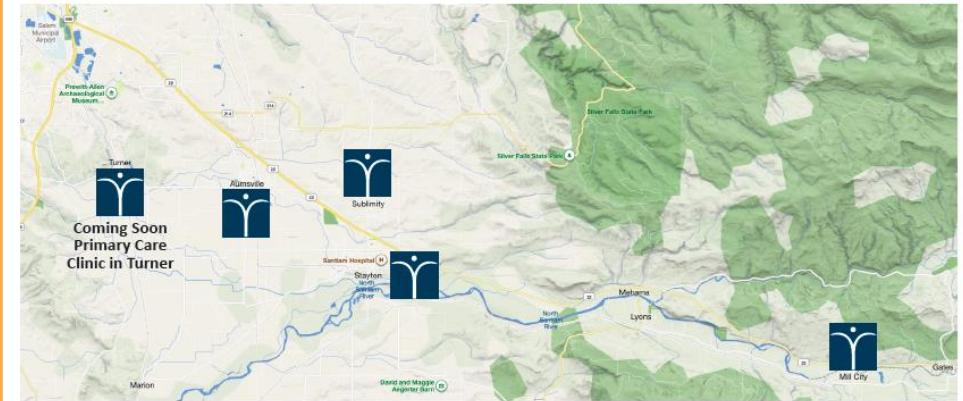


Santiam Hospital & Clinics has 2 Primary Care clinics and 6 Specialty clinics on the Hospital campus in Stayton

- Cascade Medical Clinic
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Santiam Hospital & Clinics has 3 Primary Care satellite clinics in Aumsville, Mill City and Sublimity

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Organizational Culture Fit Comparison

Mission

Santiam Hospital & Clinics

Provide quality healthcare to promote the general health and welfare of the community through education, support, and medical service

Samaritan Health Services

Building Healthier Communities Together

Vision

To serve as the healthcare center of the community

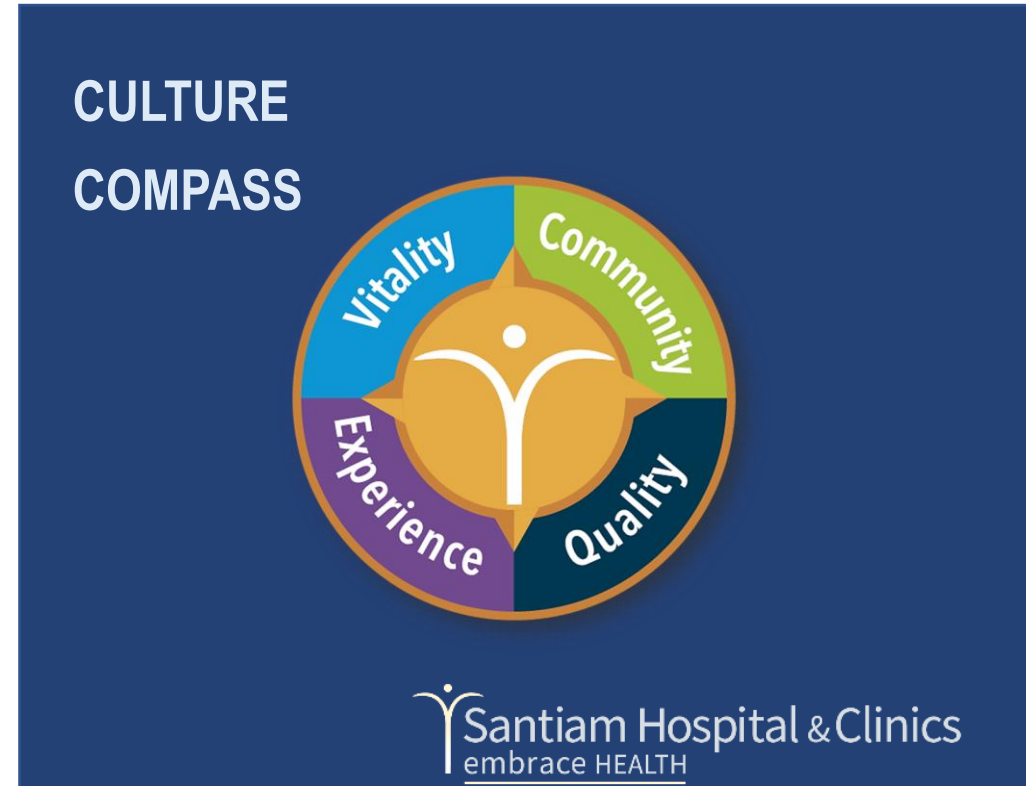
Serving our communities with PRIDE

Values

Compassion
Pride
Unity
Integrity
Dependability
Excellence

**Passion
Respect
Integrity
Dedication
Excellence**

Alignment: Quality, Community, Culture



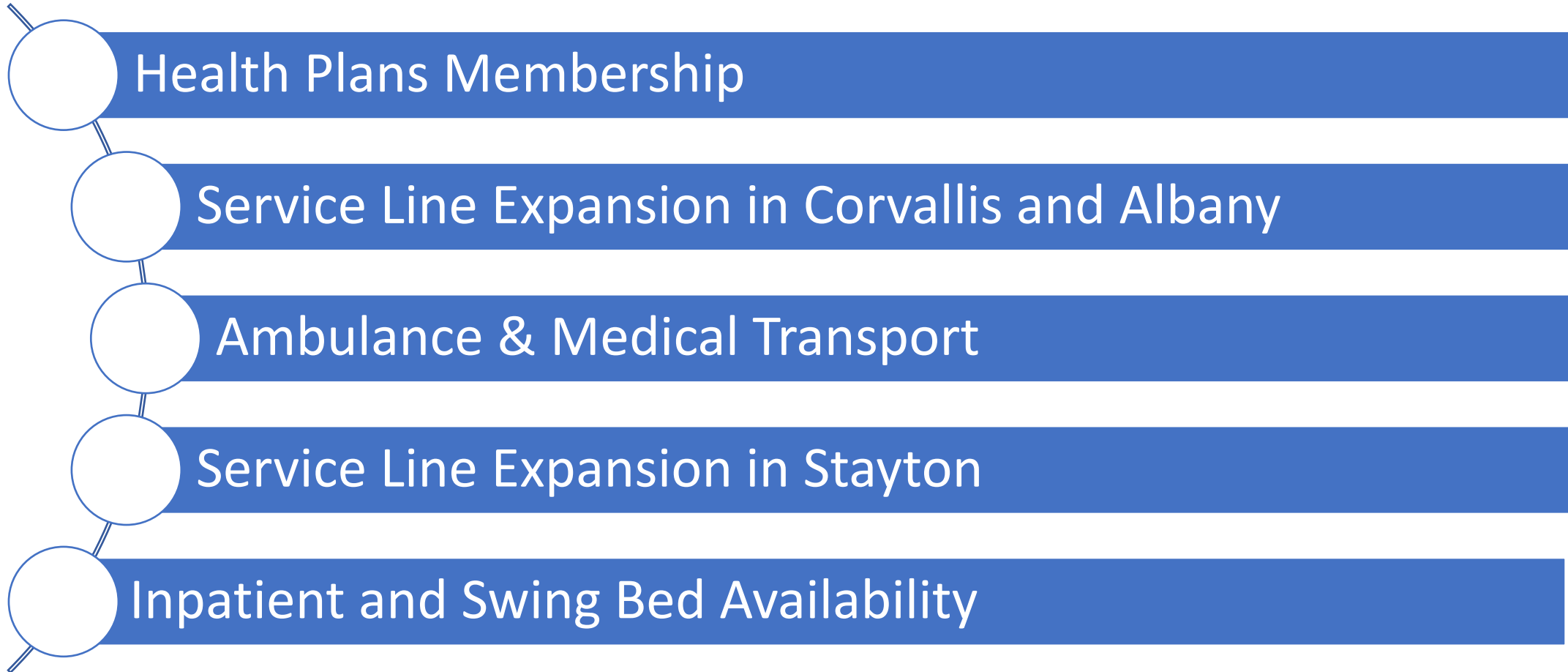


WHY SAMARITAN?

- Reputation
- Investment in local communities
- Local governance structure
- Samaritan leadership and culture
- Innovative and progressive mindset
- Proximity
- Health plan & CCO
- Medical school and residency programs
- Depth of Medical Staff and services
- Synergies



Potential Growth Opportunities



Sustainability – Economies of Scale

- Billing & Collection
- Information Services & Information Security
- Supply Chain
- Marketing & Communication
- Credentialing
- Accounting & Finance
- Payor Contracting
- Insurance Services
- Human Resources & Recruitment
- Legal, Compliance, Regulatory & Accreditation
- Quality, Patient Safety, Patient Experience & Engagement
- Strategy & Business Planning

COST VS PATIENT SATISFACTION *sample regional overview*



Key	System
★	Samaritan
■	Adventist
■	CommonSpirit
■	Governmental
■	Legacy
■	LifePoint
■	OHSU
■	PeaceHealth
■	Providence
■	Quorum
■	Salem
■	Santiam
■	State Average

Notes:

1. Patient satisfaction data shown is based on HCAHPS patient satisfaction surveys. Percent of patients highly satisfied is shown to represent a limited measurement of facility (and, by extension, system) quality.
2. Case-mix and wage adjusted cost per discharge - \$19,608

Source: CMS, Definitive Healthcare

Other Benefits



BALANCE SHEET GROWTH



GEOGRAPHIC
DIVERSIFICATION

Importance of Growth

Samaritan Health Services, Oregon Oregon Facilities Authority; System

Credit Profile

Oregon Facilities Authority, Oregon

Samaritan Health Services, Oregon

Oregon Facs Auth (Samaritan Hlth Services) SYSTEM

Long Term Rating

BBB+ / Stable

Affirmed

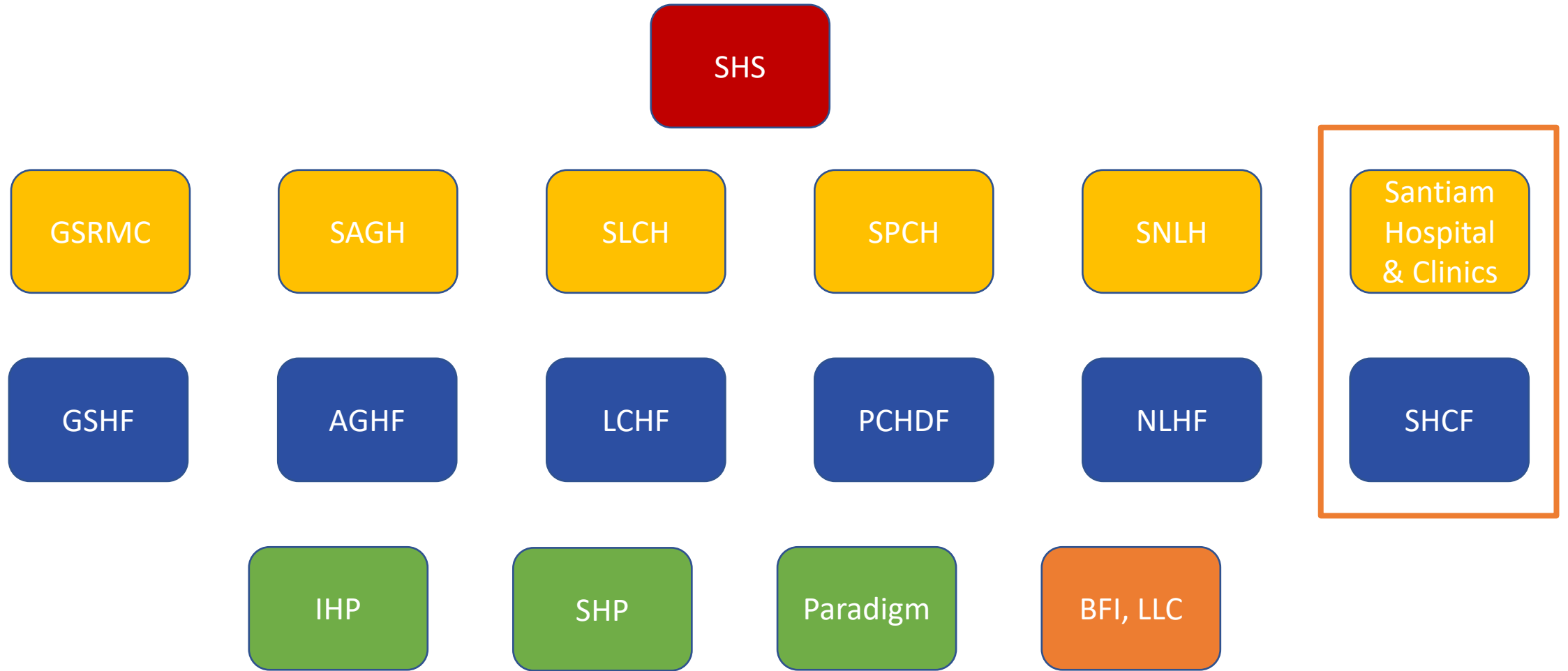
Security

SHS' bonds are secured by revenue of the obligated group.

Credit overview

The rating reflects our view of SHS' essentiality as the dominant provider of acute care services in its market (Corvallis, Ore., and portions of five counties); added revenue diversity provided by its health plans (which account for almost 40% of the systems net revenue); and stable payor mix, with the majority of net patient service revenues coming from Medicare and Commercial patients. However, we note that SHS operates in a limited primary service area (PSA) and has a smaller geographic footprint than other rated systems, making the system inherently more vulnerable to industry and operating pressures.

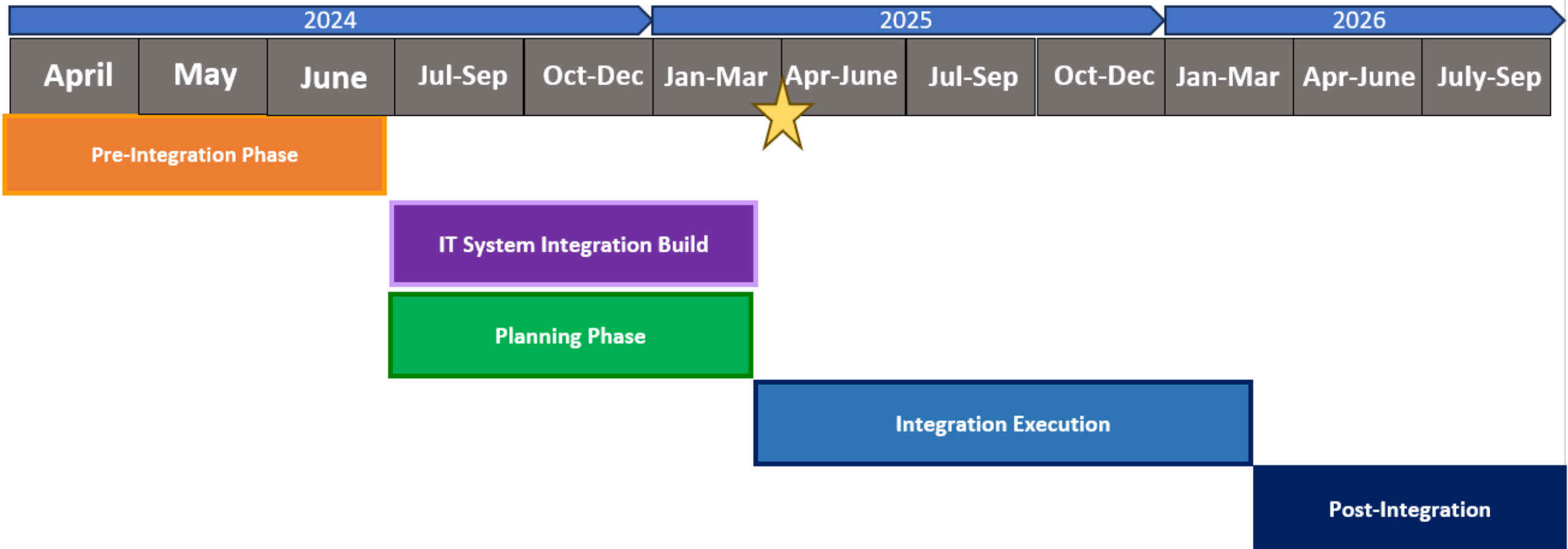
Vision for the Future



Planning for the Next ~50 Days



Proposed Affiliation Timeline





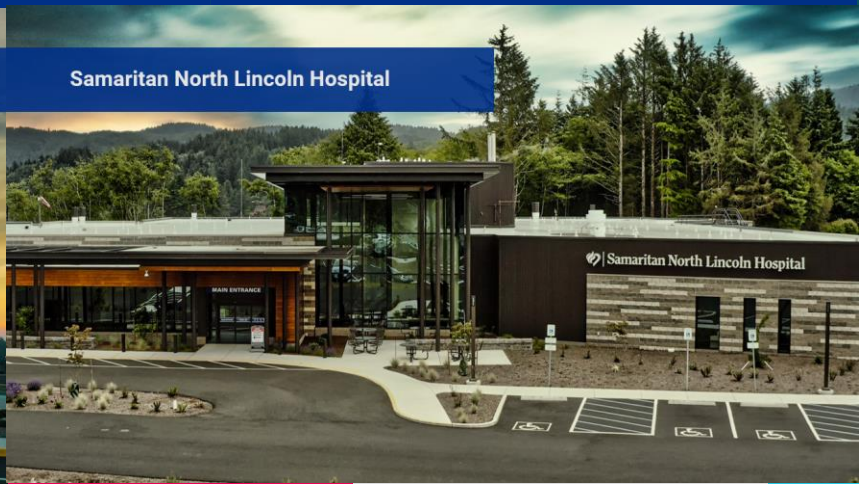
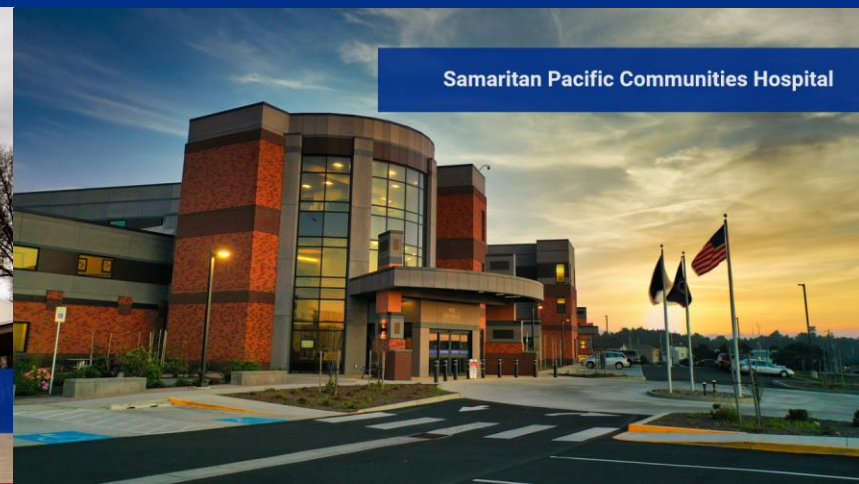
Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH



Larissa Balzer

From: Doug Boysen
Sent: Monday, June 10, 2024 9:11 AM
To: Email All SHS
Subject: Monday Morning Virtual Huddle

Good morning. I hope you had a chance to enjoy the warm weather over the weekend.

Wanted to give you all a heads up that I will be doing a virtual town hall session tomorrow at 8:30 am. Last week you should have received an email invitation to this event. The purpose of this town hall is to specifically talk about the potential affiliation with Santiam Hospital and Clinics. I realize this is short notice, but I am hearing requests for more information about the potential affiliation. I want to be as transparent as possible. During the town hall I will give an overview explaining the rationale of the affiliation and what it will look like if we ultimately come together. There will be time for your questions as well.

Although the town hall invite was sent to everyone, please know it is not mandatory that you attend. I know many of you will be unable to attend and I completely understand that. The town hall will be recorded and available to watch at your convenience.

Have a great week!

Doug

Forward Together



Samaritan
Health Services



Santiam Hospital
& Clinics
embrace HEALTH

SANTIAM AT-A-GLANCE

Our People

650+ employees

70+ employed clinicians

- From primary to specialized care

Our System

Non-profit

Integrated Delivery System

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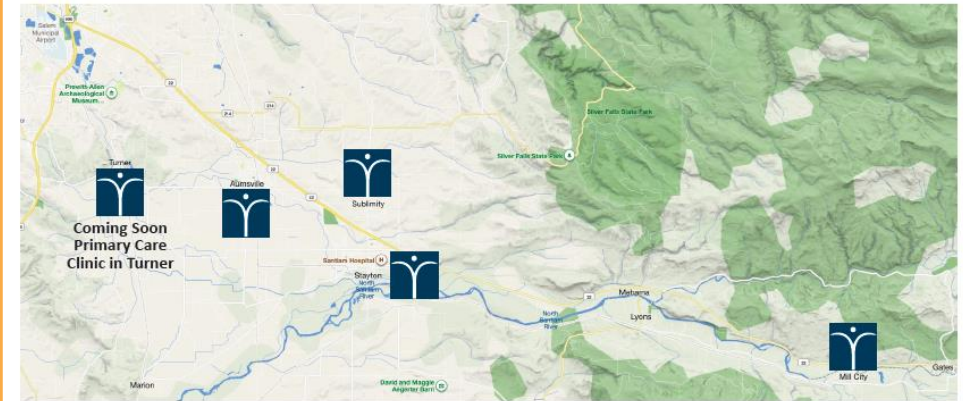


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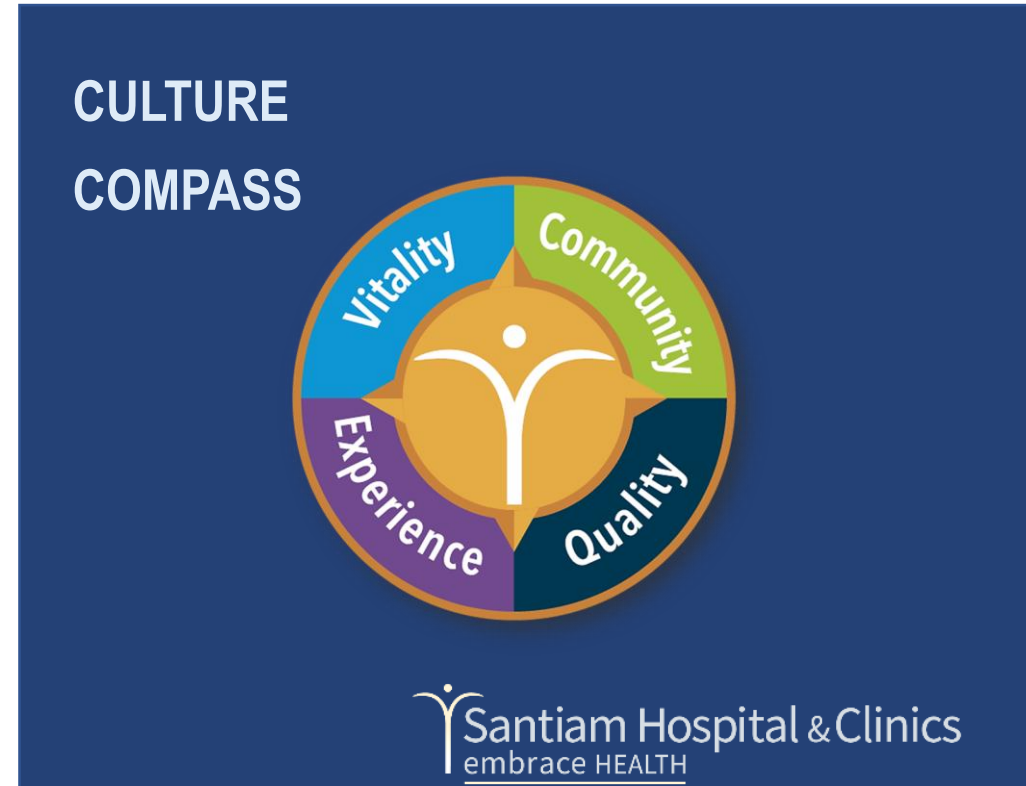
Serving our communities with PRIDE

Values

Compassion
Pride
Unity
Integrity
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Alignment: Quality, Community, Culture



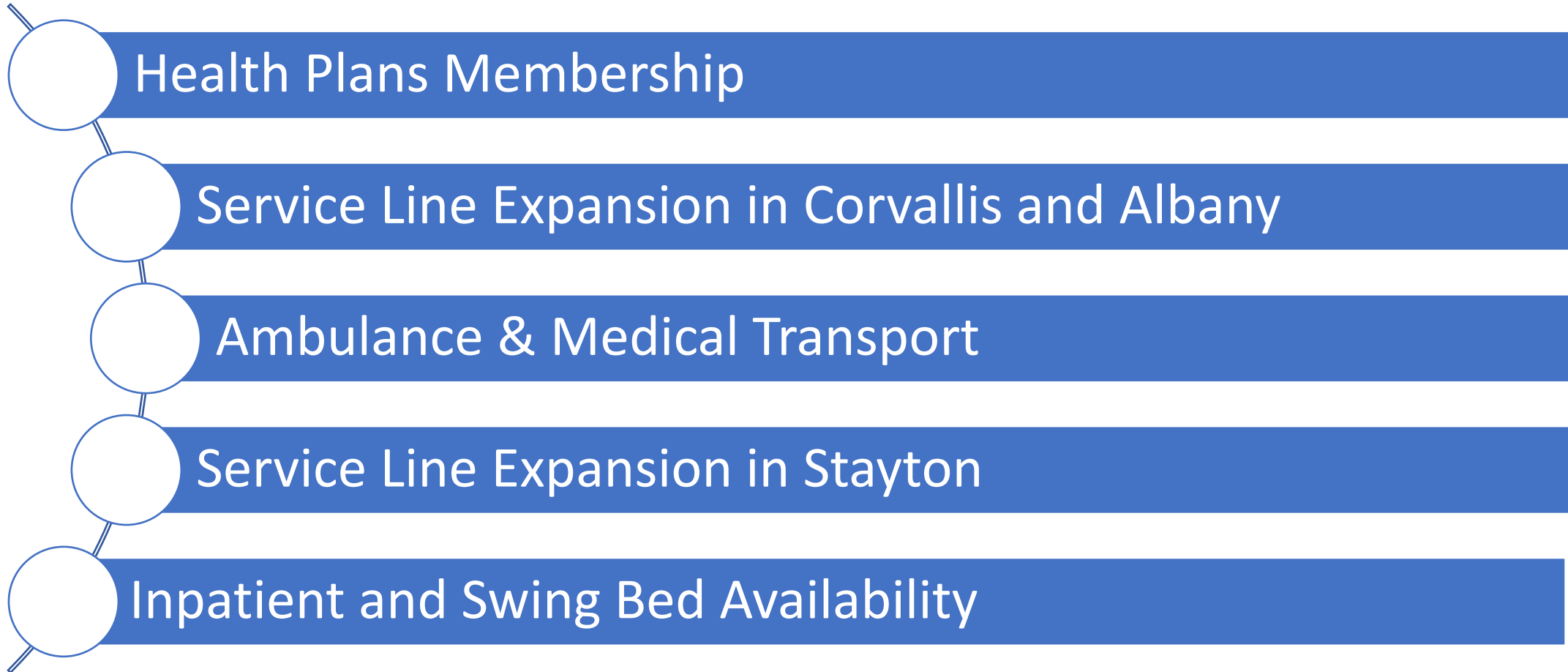


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Potential Growth Opportunities



Sustainability – Economies of Scale

- Billing & Collection
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- Supply Chain
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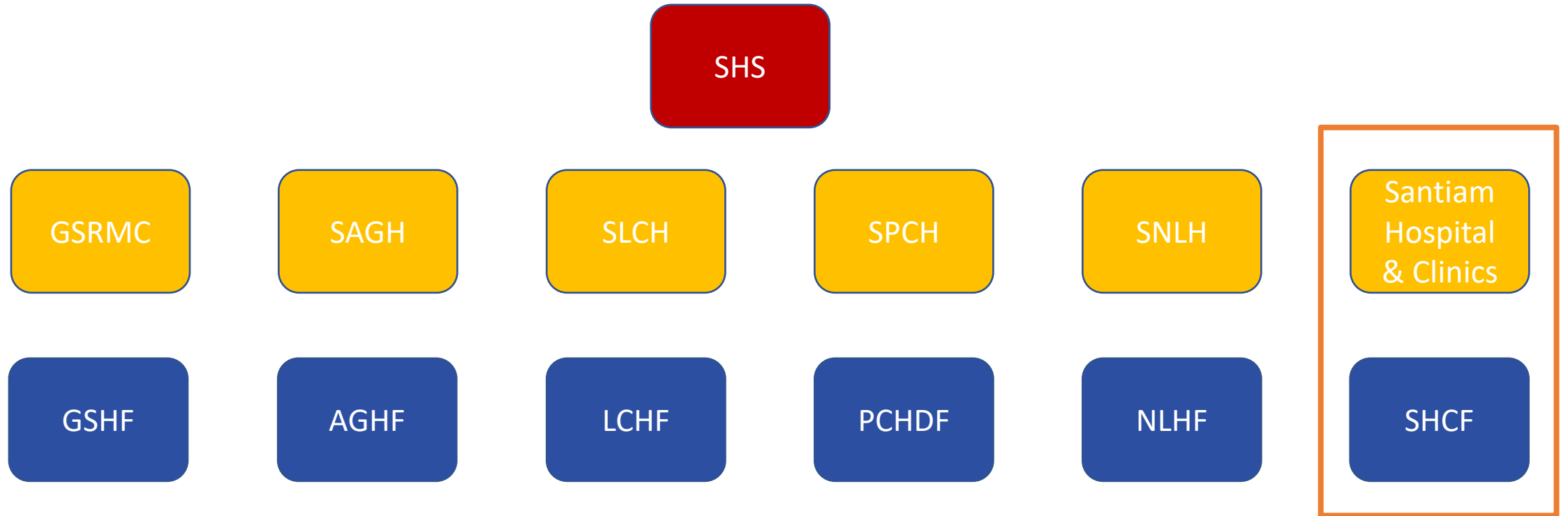
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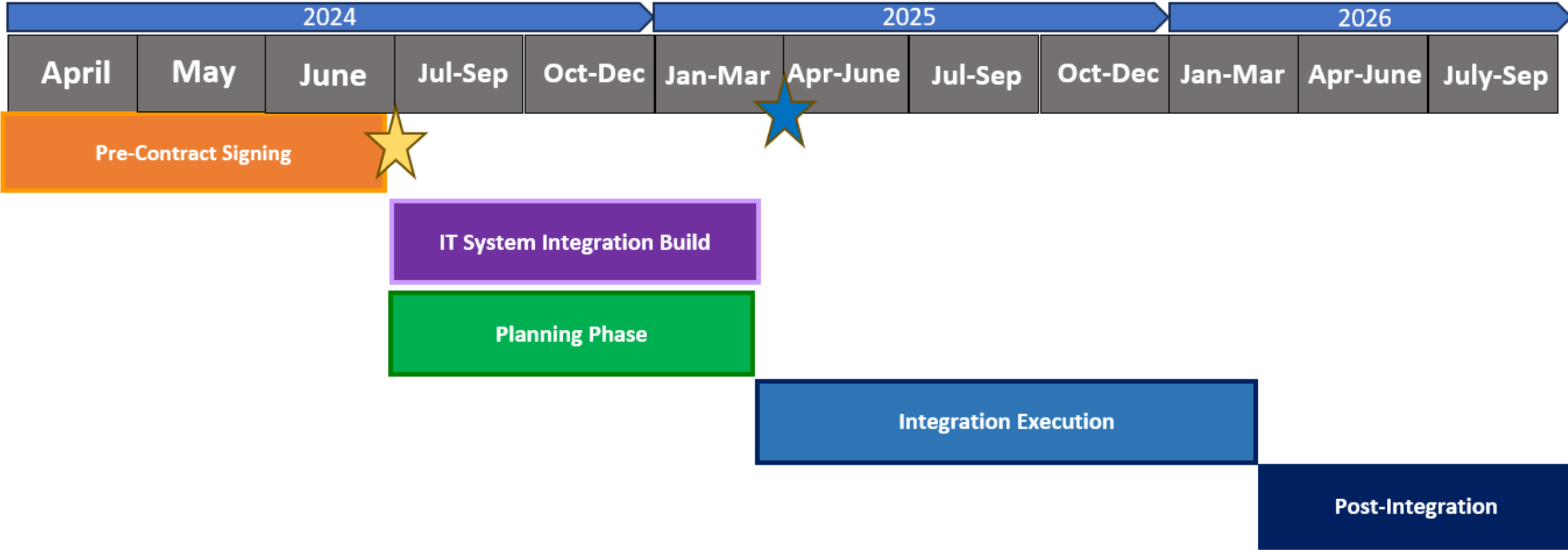
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Vision for the Future



Proposed Affiliation Timeline



 Contract Signing

 Santiam Joins SHS



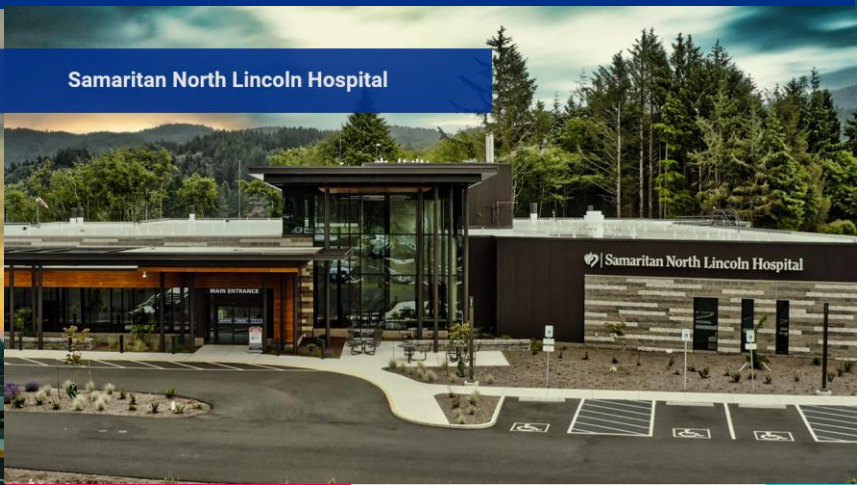
Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH



Forward Together



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Health Services



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SANTIAM AT-A-GLANCE

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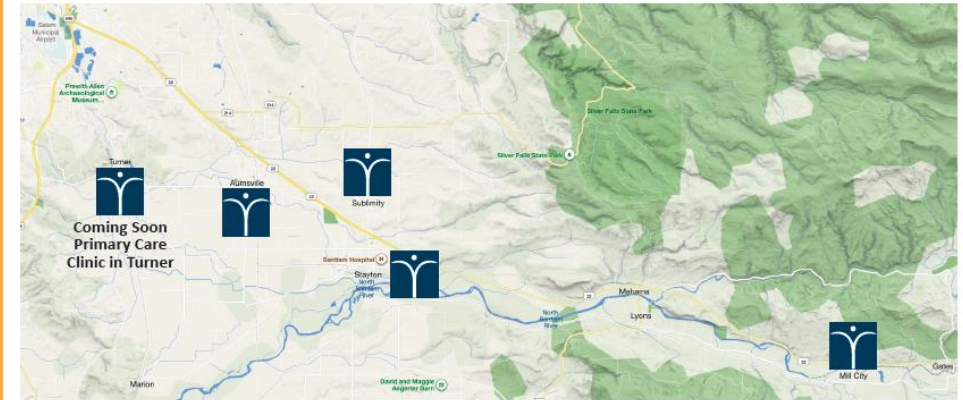


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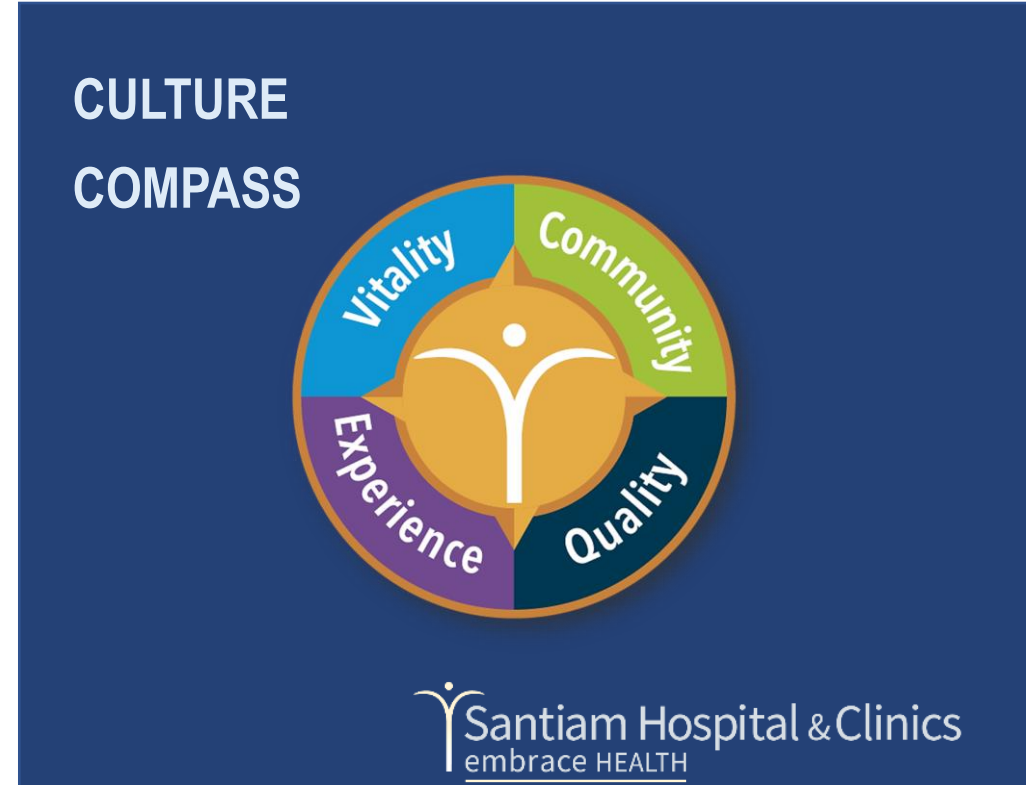
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Potential Growth Opportunities

- Health Plans Membership
- Service Line Expansion in Corvallis and Albany
- Ambulance & Medical Transport
- Service Line Expansion in Stayton
- Inpatient and Swing Bed Availability

Other Benefits



ECONOMIES OF SCALE



BALANCE SHEET
GROWTH



GEOGRAPHIC
DIVERSIFICATION

Importance of Growth

Samaritan Health Services, Oregon Oregon Facilities Authority; System

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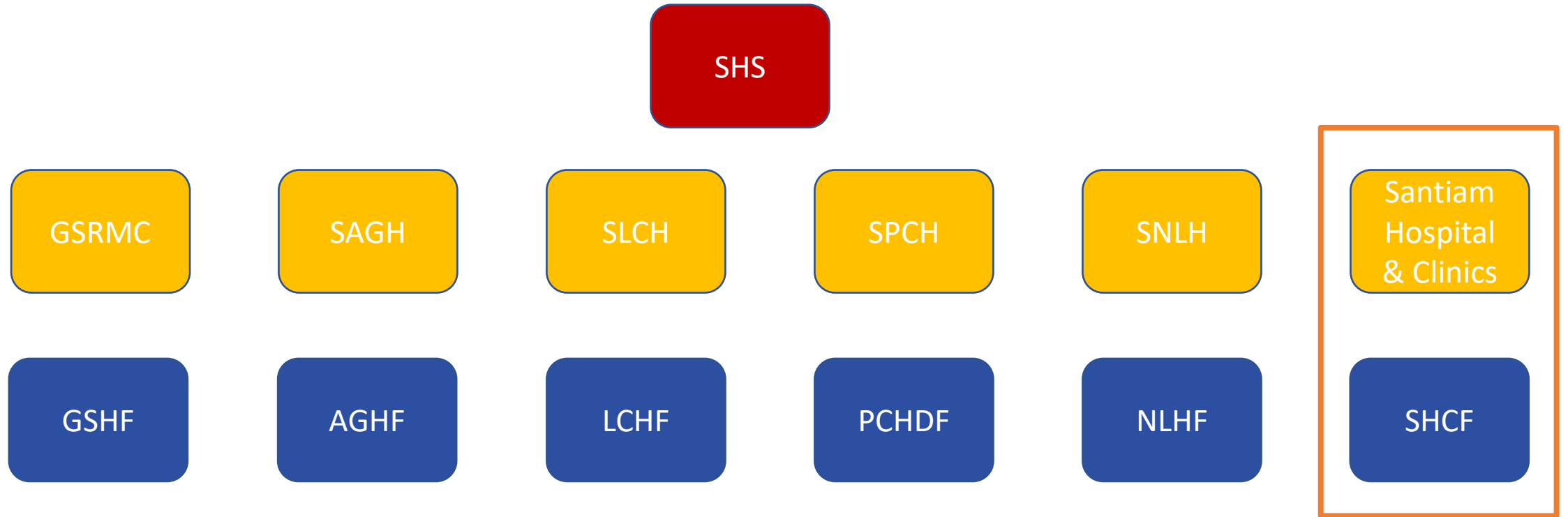
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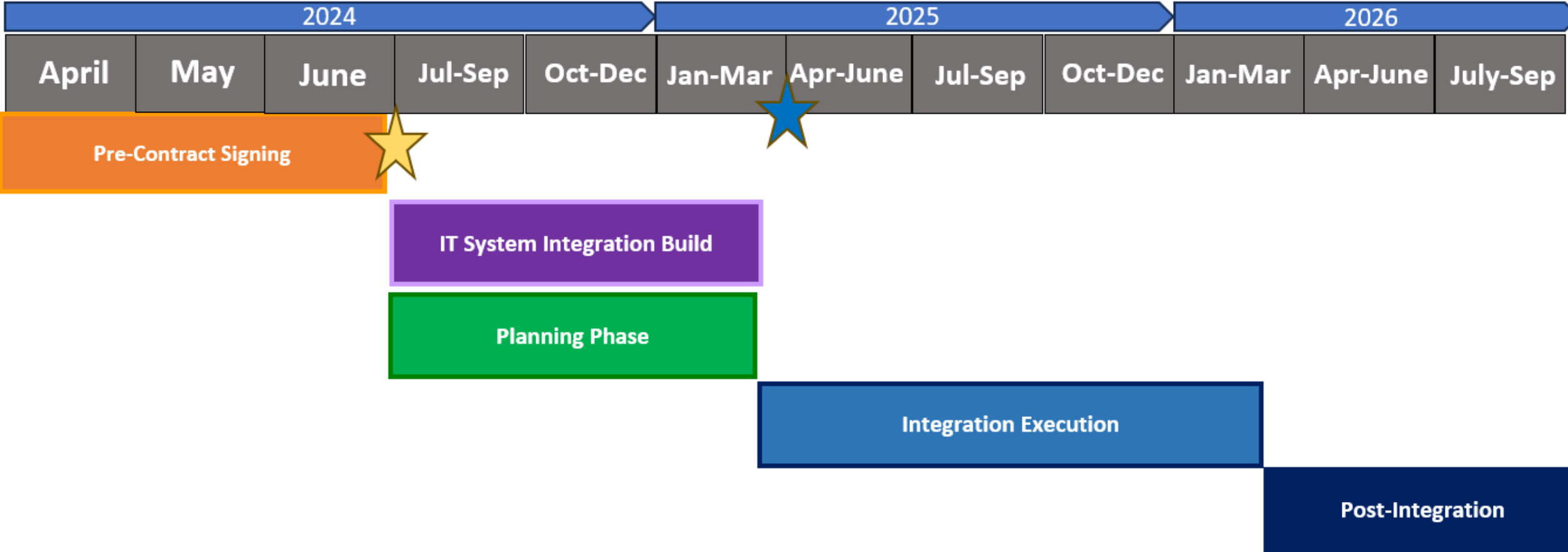
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Vision for the Future



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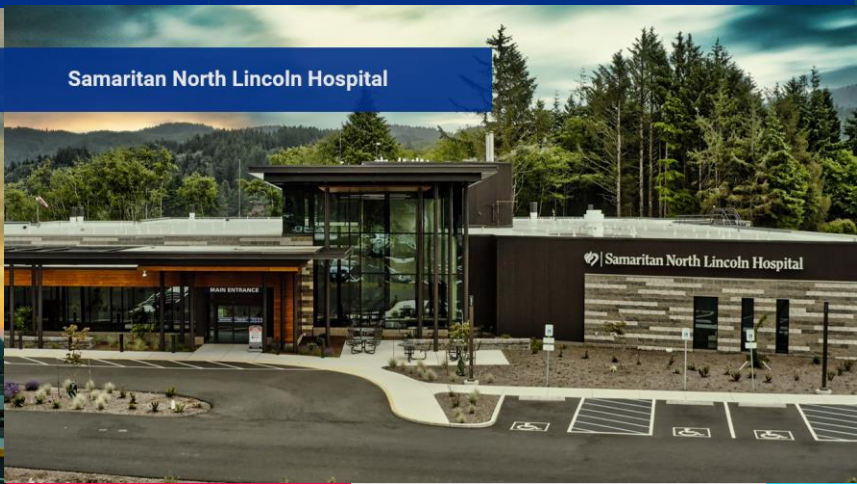
Forward Together



Samaritan
Health Services



Santiam Hospital & Clinics
embrace HEALTH



Larissa Balzer

Subject: FW: Samaritan/Santiam Integration Planning Efforts
Attachments: Integration Planning Functional Areas and Leads.pdf

From: Larissa Balzer <lbalzer@samhealth.org>
Sent: Monday, July 29, 2024 8:01 AM
To: Larissa Balzer <lbalzer@samhealth.org>
Cc: Project Management <ProjectManagement@samhealth.org>
Subject: Samaritan/Santiam Integration Planning Efforts

Good morning,

In the coming weeks, we will be launching the next phase of our integration planning efforts with Santiam Hospital & Clinics. In order to prepare for the potential affiliation early next year, we will be bringing leaders together from both organizations to develop implementation plans. These plans will not be implemented until a definitive agreement is reached, the Oregon Health Authority approves the transaction, and the affiliation is completed, which is targeted for April 2025. **You are receiving this communication because you have been identified as a functional area leader, or subject matter expert who will play an essential role in integration planning and implementation.**

You will receive more information in upcoming kick-off meetings related to the Integration Governance Structure and how your functional team will fit into that overall structure. I have also attached a list of functional areas grouped by division for your review. At this time, we have established an integration project management team comprised of Samaritan and Santiam leadership, project managers, and members of a third-party advisory firm, PYA, who have experience facilitating hospital integrations. This team will coordinate all aspects of the integration planning on behalf of Samaritan and Santiam.

What do I need to do next? We have scheduled an integration team kick-off meeting (invite forthcoming), where you will learn more about the objectives, guiding principles, and the overall planning process. That will be followed by more focused meetings by functional area where you will learn about the process and make connections with Santiam leaders. We expect these sessions to occur starting in mid-August. Please make every effort to attend these sessions as scheduled.

Thank you in advance for your participation and commitment to this process. We know that integration planning will be an investment of your time and resources. However, ***your participation, leadership and enthusiasm will be fundamental to our ability to move Forward Together.***

Please don't hesitate to reach out directly with questions.

Thank you,

Larissa Balzer, MBA (she/her) | Vice President, Strategy & Planning
Samaritan Health Services
P 541-768-5001 | C 541-760-7220
lbalzer@samhealth.org
samhealth.org



Larissa Balzer

Subject: Canceled: Samaritan/Santiam Integration Planning Kick-Off
Location: Microsoft Teams Meeting

Start: Mon 8/12/2024 12:30 PM
End: Mon 8/12/2024 2:00 PM
Show Time As: Free

Recurrence: (none)

Meeting Status: Not yet responded

Organizer: Larissa Balzer

Required Attend

High

Integration Kick-Off Team,

Due to unforeseen competing priorities, we will be rescheduling this initial planning meeting. Thank you for your flexibility on timing.

I know we are all excited about our affiliation and experiencing much anticipation about the work to come. For your awareness, as we move forward together, through definitive agreement, toward Oregon Health Authority review and formal affiliation, we will be working to prioritize and streamline integration planning efforts and the associated implementation timelines.

Again, I appreciate your flexibility and resilience as we navigate this process together and look forward to connecting on next steps in the near future.

Microsoft Teams [Need help?](#)

[Join the meeting now](#)

Larissa Balzer

From: Doug Boysen
Sent: Monday, September 16, 2024 8:51 AM
To: Email All SHS
Subject: Monday Morning Virtual Huddle

Good morning. I hope you had a nice weekend.

Over the past two weeks I've heard from many of you about our financial situation and cost reduction plans. I can attest to this - many of you are certainly not afraid to speak your minds! Ultimately, I am glad that many of you are engaged, feel ownership in our future and feel comfortable reaching out directly to me. I read all of your emails and learn from them.

One common theme I've heard is whether we are planning to grow, rather than just cut expenses to better our financial position. I have two thoughts on this. We do need to cut expenses because we had a very rapid deterioration of our financial status. Our situation really started to plummet just within the last few months. A growth strategy takes time and we need rapid improvement. Hence, the importance of a quick cost reduction strategy.

That said, I fundamentally agree that we can't continue to cut our way to prosperity. Growth is also necessary for sustainability. With that in mind, we have several growth strategies in the works. In the future we plan to open new primary care clinic locations, expand some specialty service lines, construct more inpatient beds at Good Samaritan Regional Medical Center and, probably our greatest opportunity, is to bring Santiam Hospital into the Samaritan system.

That last growth opportunity relates to the second question I am commonly hearing. The question is should we be buying another hospital right now? I want to emphasize that we are not "buying" Santiam Hospital. They are choosing to join the Samaritan system. While we will take on their debt when they become part of Samaritan, we will also be taking on their assets and revenue. We are going to be making capital improvements at Santiam, but these improvements are consistent with capital contributions that we make at all of our sites. The business arrangement for Santiam Hospital joining Samaritan is absolutely consistent with how the other five existing Samaritan hospitals joined the system.

Speaking of Santiam Hospital, I am happy to say that last Thursday we signed the definitive agreements to consummate the affiliation. This is a huge milestone for this project and is reflective of the great collaboration we are having with that organization. This, however, does not mean that it is a done deal. We must still obtain approval from the state of Oregon and we have other integration work before we can close the transaction. As of right now, we are scheduled for them to officially join Samaritan on June 1, 2025.

As I said above, Santiam Hospital will further our growth strategy because it will allow us to serve 40,000 new people. It will also turn our five hospital system into a six hospital system with more assets and economies of scale. Most importantly, though, it will allow Santiam Hospital to continue to sustainably provide healthcare services to their communities.

Have a great week.

Larissa Balzer

From: Larissa Balzer
Sent: Thursday, September 19, 2024 9:31 AM
To: Larissa Balzer
Subject: Integration Planning Update

Hello all,

As you read in Doug's Monday Morning Virtual Huddle, last week's signing of the definitive agreement marked an exciting milestone in our integration efforts with Santiam Hospital & Clinics. As we continue to advance our planning efforts, I wanted to share the updated target timeline and details on our planning efforts.

We anticipate fully integrating our two systems will take us more than a year. Because of the complexity involved in combining our organizations, all affiliation efforts will be planned and orchestrated at the system level. **At present, individual departments or leaders should not independently engage their counterparts at Santiam.**

The system plan calls for staggering the integration of our operations and core IT systems to provide Santiam and Samaritan teams with the time needed for planning and execution. The timeline below outlines integration priorities for the first ~60 days. Please note the **dates below are tentative** as they are dependent on receiving approval from the Oregon Hospital Authority (OHA).

- June 1, 2025, Target Transaction Close Date
 - Santiam Hospital & Clinics becomes Samaritan Santiam Hospital
 - Santiam employees become Samaritan employees
 - Santiam clinicians become part of Samaritan Medical Group
- August 1, 2025, Target Epic & Associated Systems Go-Live
 - Santiam conversion onto SHS Epic Instance
 - Peoplesoft for Accounting, Finance, and Supply Chain
 - Credentialing, Licensing, Payor Contracting, Billing & Coding

The items listed above represent only a fraction of the integration activities. Timelines still need to be determined for many items, including hospital accreditation, additional IT application conversions, optimizing systems based on shared learnings from our planning efforts, growth initiative exploration and planning, and much more.

For the remainder of 2024, our integration planning efforts will largely focus on the following areas:

- Information Services
- Human Resources
- Medical Group
- Supply Chain

In January 2025, we anticipate formally kicking off all integration planning efforts in coordination with PYA, a healthcare integration consultant we have engaged to support this work. We will leverage their expertise and tools to assist us throughout this process.

Please be on the lookout for additional updates in the coming months and thank you in advance for your engagement in these planning efforts. We are very excited to be moving forward together, and it will not be possible without your leadership and support.

Thank you,

Larissa Balzer, MBA (she/her) | Vice President, Strategy & Planning

Samaritan Health Services

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lbalzer@samhealth.org

samhealth.org



*This message was sent to all individuals invited to the Samaritan/Santiam integration planning kick-off meeting, which was postponed.



All Boards Retreat

Welcome and System
Update



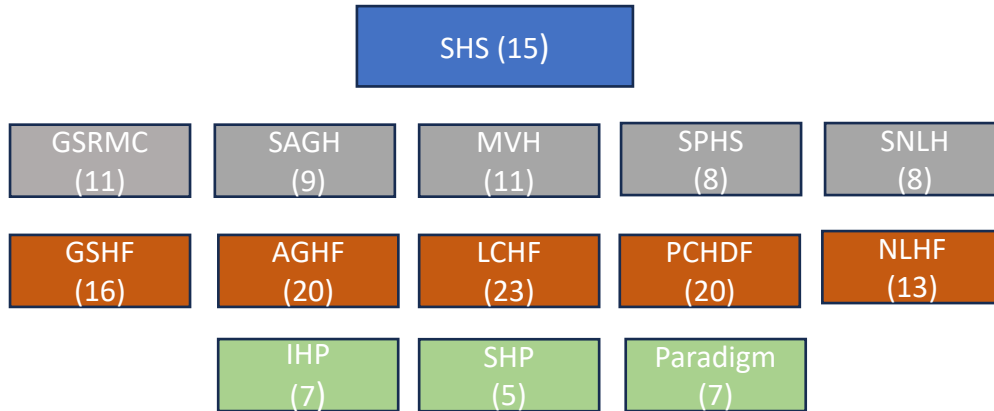
Samaritan
Health
Services

2024 All Boards Annual Retreat

9/27/2024

Duration	Topic	Presenter(s)
12:00-12:30	Welcome and System Updates	Nancy Seifert Doug Boysen
12:30-1:30	Keynote Speaker: The State of the Industry	Max Hakanson
1:30-1:40	Q&A	All
Break 1:40-1:50		
1:50-2:10	Financial Overview	Dan Smith
2:10-2:30	Operational Efficiency	Larissa Balzer
2:30-2:40	Q&A	All
2:40-3:00	Vizient Updates	Kelley Kaiser
3:00-3:05	Q&A	All
3:05-3:25	Closing Remarks	Doug Boysen
3:25-3:30	Q&A	All

Who is here today?



Total Board Member Positions - 173

Third Annual SHS All Boards Retreat



Community Service
Mission
Learning
Serving
Power
Oversight
Progress
Health
Passion
Pride
Giving back
Service
Community
Responsibility
Generosity
Participation
Helping
Sharing
access
Contribute
Hope
Community Service
Continuity



Current Healthcare Environment



Forward Together



Samaritan
Health Services



Santiam Hospital
& Clinics

embrace HEALTH

Growth Opportunities

- Health Plans Membership
- Service Line Expansion in Corvallis and Albany
- Ambulance & Medical Transport
- Service Line Expansion in Stayton
- Inpatient and Swing Bed Availability

Affiliation Benefits



Advancing
Mission



Economies of
Scale

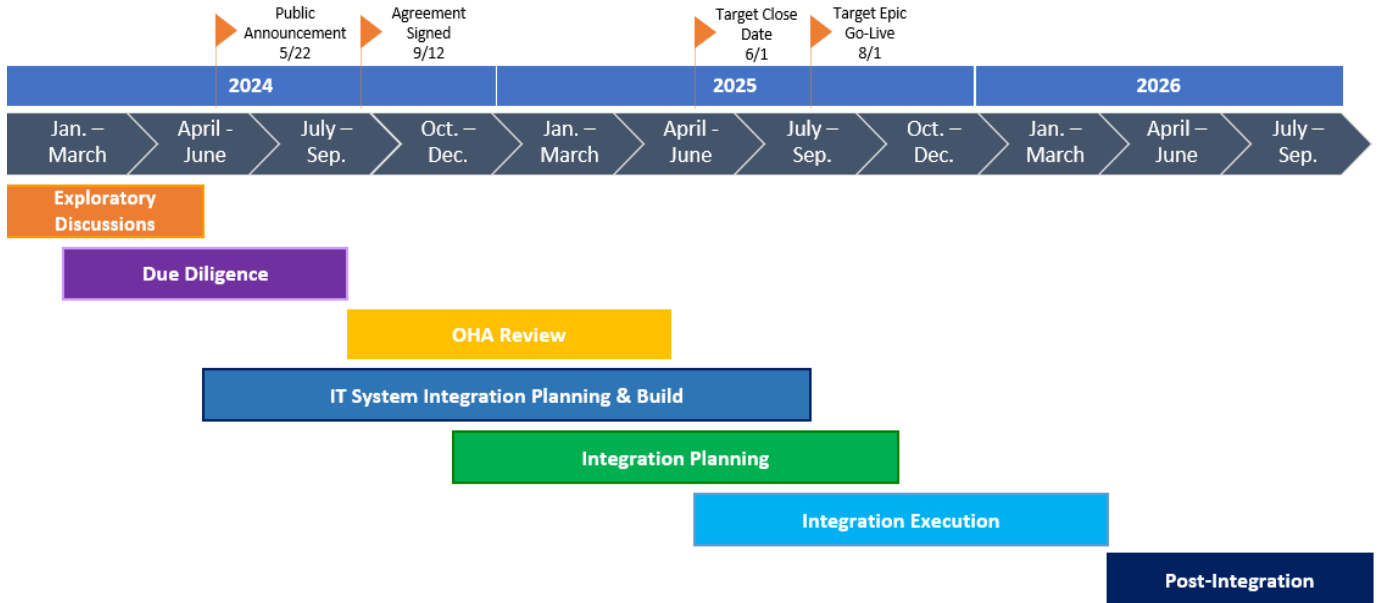


Balance Sheet
Growth



Geographic
Diversification

Planned Affiliation Timeline



Thank you!





System Update – October 2024

Agenda

Financial Update

Santiam Hospital Update

Other System Updates

Questions

*All slides not pertaining to the affiliation have been redacted

Forward Together



Samaritan
Health Services



Santiam Hospital
& Clinics
embrace HEALTH



Samaritan
Health
Services

Definitive Agreements are Signed!



Motivation for Affiliation



Culture and People



Community Engagement



Learning From Santiam



Advancing Our Mission



Balance Sheet Growth



Economies of Scale



Geographic Diversification

Potential Growth Opportunities

- Health Plans Membership
- Service Line Expansion in Corvallis and Albany
- Ambulance & Medical Transport
- Service Line Expansion in Stayton
- Inpatient and Swing Bed Availability

Integration Planning Update



Current Focus Areas:

Communication/Employee Engagement
Epic
Human Resources
Medical Group



Next Steps

Engaged an integration consultant to help with planning in 2025
Plan to establish 30+ functional teams to assist in plan development & execution

Thank you!

