

# 2009

## Highlights & Accomplishments

As part of the Summa Health System's strategic plan, the Summa Foundation has assumed the leadership role in advancing the System's community transformation agenda. Over the last three years, with its shift to a free-standing system entity, a new primary role in identifying the needs and priorities of the system, and a structural reorganization, the Foundation has evolved to the scale necessary to support the growth and integration of the system.

Encompassing resource development, community benefit and diversity, and government relations and health policy, the Foundation has grown from its inception as an organization that supported one hospital with two campuses, to one that supports an entire system.

With the support of the Summa Health System leadership and its boards, the Summa Foundation became a System entity as of January 1, 2010. The rapid growth of Summa Health System over the past five years necessitated this change to better position the Foundation to assist all Summa entities in achieving their goals, instead of serving just one hospital. This change goes beyond mere legal status; it represents a shift in ideology as well. By becoming a system entity, the Foundation has the capacity to support the entire system and take on the role of an active and strategic leader in leveraging relationship, policy and funding opportunities in the advancement of Summa Health System goals.

The Foundation also has taken the lead role in identifying the priorities of the system with the development of a system-centric priority-setting process. And as a champion for innovation, the Foundation works to find breakthrough opportunities within Summa, where the potential exists to

innovate, commercialize and contribute to improving standards of medical practice and the body of knowledge.

Three years ago, Summa Health System President Tom Strauss and the Foundation board realized that as the ambitions of Summa Health System grew, as its profile changed and the responsibilities to the community changed, the mission of the Summa Foundation needed to change along with it.

### What this means is that...

- as the system takes on more community responsibilities; the Foundation must develop new strategies and partnerships to better serve our communities;
- as the system serves as a catalyst for economic growth, the Foundation will forge relationships that encourage opportunities within the system, and for the system within the community; and that
- as the system continues its century-long tradition of industry-leading medical education and clinical research, that the Summa Foundation can play a primary role not only funding and shaping those efforts within Summa, but convening collaborators to create a better environment where research and education can thrive.

This transformation is by no means complete—the Foundation will always seek new and innovative ways to carry out its mission and vision. The accomplishments of 2009, while notable, serve to inspire and motivate the Foundation's commitment to building a healthier community and further distinguishing Summa Health System as a national leader in medical research and clinical innovation.

# Development

The Office of Development made great strides in building its infrastructure around principal giving, by continuing to lay key building blocks in all areas, including gift planning, annual programs, grant and proposal development, prospect research and operations. Primary elements of this transformational shift are a honed focus on system priorities, a major gift mindset that drives all activities—particularly cultivation—and establishment of best practice models to maximize both return on investment and prudent use of resources.

## Principal Giving and Infrastructure

- Exceeded \$65 million in major gift asks, grant applications and appropriation requests, an all-time high.
- Increased outreach to new prospects and donors by 36% overall in 2009.
- Significantly increased solicitations to individuals, up 72% compared with 2008.
- More closely integrated fundraising functions throughout the system, and developed an overarching system fundraising policy to coordinate resources for maximum return.
- Refined processes and streamlined for efficiency, improving reporting, moves management and other operational areas.
- Launched exploration of all facets of a comprehensive fundraising campaign.
- Introduced a new e-newsletter, Partners for Impact, to inform and engage more than 1,300 of our constituencies.

## Grant and Proposal Development

- Heightened emphasis on strategic partnerships and collaborations, both internal and external.
- Developed a formalized process for all grantmaking and grantseeking applications throughout the System.
- Implemented record-high grants activity in the public sector.
- Formed the first corporate partnership through receipt of a corporate sponsorship from PNC, formerly National City Bank, for the HealingArt Program.

## Annual Programs

- Generated more than \$120,000 in annual support from members of the Summa Health System, Summa Foundation, Summa Health System Hospitals and SummaCare boards, with an average participation rate of almost 90%.
- Implemented a grateful patient program in a concerted effort to cultivate former patients, acquire new donors and enhance our overall donor base.

## Donor Engagement and Education

- As part of the move toward a principal giving focus, stepped up efforts to take every opportunity to educate, engage and recognize donors and prospects, including small-group gatherings at private homes.
- Partnered with the Department of Surgery to produce the first-ever remote live broadcast of minimally invasive surgery in Akron to exclusive audiences in Florida, featuring two-way audio and visual communication.
- Instrumental in bringing a number of world-class medical education and research topics to the region through a number of lectures/symposia, including W. Randolph Chitwood Jr., MD, an international pioneer in minimally invasive and robotic heart surgery, to speak at Summa Akron City Hospital.
- Helped facilitate Humanism and the Healing Arts conference and the inaugural Summa Research Forum.
- Coordinated three fundraising events, raising nearly \$350,000 total to benefit the Women's Health Center renovation, men's health programming and critical care medical education.
- Established framework for the HealingArt Program with a goal of improving, advancing and enriching the healing experience of our patients, their family, visitors, employees and the community through the use of art.

## Community Benefit & Diversity

Building upon Summa's long-standing culture of community benefit and diversity awareness, the department of Community Benefit and Diversity significantly impacted the health of our region through the efficient use of resources in the areas of outreach, community relations and reinvestment opportunities, and diversity awareness and education.

## Department Reorganization

- Renamed the Department of Community Benefit and Diversity, the reorganization provides better alignment with both system and Foundation goals and priorities, and the ability to implement mission-focused programming.
- Created the Office of Community Reinvestment, which incorporates the volunteer services department, the employee volunteer engagement program and the corporate reinvestment program, to better focus on the strategic and evidence-based allocation of charitable resources.
- Expanded departmental scope to include the Center for Minority Health and Health Disparities Solutions and Family Medicine in the Community Curriculum.
- Established the Summa Foundation Board of Directors Community Benefit Committee to define a system-wide Community Benefit Plan.

## Community Health Outreach

- Presented the 2008 Community Benefit Report with speakers Tom Strauss, August Napoli, Nancy Schlicting, and Paul Hattis at Summa's annual Community Leadership Briefing in May 2009.
- Continued to provide strategic and operational direction to community and system health prevention, access, education, and promotion initiatives including Healthy Connections Network / Access to Care; Akron Community Health Resources; Minority Health Roundtable; Summit Portage Area Health Education Center; Akron Office of Minority Health; and the Austen Biolnnovation Institute of Akron.
- **Provided strategic and operational direction to community and System health prevention education and promotion strategies:**
  - OPEN M – Financial support allowed for continued expansion of the pharmacy formulary, providing consistency in pharmaceutical treatment, and for increased capacity.
  - Akron Community Health Resources – Financial support and active participation at the Board level contributed to the stabilization of the current location, expansion into Portage County, and the relocation of three dental chairs to Portage County.
  - Access to Care – Financial and physician practice support have allowed patients continued access to needed medical services. Advocacy efforts have resulted in Akron City Council providing funding to the program.
- Ongoing support provided to the Minority Health Roundtable, Tobacco Coalition and Summit Portage Area Health Education Center.

## Community Relations

- Worked to strengthen Summa's corporate responsibility role in the community and maintained a presence and voice through participation and leadership on boards and commissions including OPEN M, Habitat for Humanity, Healthy Connections Network / Access to Care, Summit Portage Area Health Education Center, Akron Office of Minority Health, Minority Health Roundtable, American Heart Association, Akron Community Health Resources, Cuyahoga Valley National Park Board, and the Salvation Army Board. Participation in some of Akron's signature community events, such as the Akron Road Runner Marathon and the King for Kids Bike-a-Thon, enhanced community agency relationships that are most consistent with our mission and community benefit standards.
- **Provided community presence and support through participation in the following activities:**
  - Cornerstone LEAP community outreach – assisted homeless and underserved population with services, school supplies and food.
  - National Night Out Against Crime – sponsored by the City of Akron mayor's office, where Summa medical staff provided health screenings in our mobile health unit.
  - Back to School Giveaway – sponsored by the Akron Urban League and Akron Metropolitan Housing Authority. Provided school supplies and physicals for students in Summa's mobile health unit. Fifty physicals were provided at this event.
  - Fugitive Safe Surrender – held at The House of the Lord in

partnership with the City of Akron, the legal system and numerous other agencies.

- Participated in the Akron Zoo's Backpack Adventure which provided school supplies to Akron Public Schools' students.
- United Way Day of Action.
- Summa also actively participated in the facilitation of strategic partnerships with universities, faith-based organizations, and local schools and programs, including Project Grad, Summit Education Initiative, Member of KSU School of Public Health Advisory Committee, Member of UPA Partners Sub grants Committee, Perkins Block Club collaboration and supportive sponsorship, Neighborhood Ecumenical Coalition, The Middlebury Pastor Cluster, and the Mountain of the Lord with Pastor Eugene Norris.

## Diversity

- Developed a year-long Continuing Medical Education (CME) curriculum to focus on healthcare disparities. The first CME event, a Grand Rounds and workshop, "Health Disparities, Cultural Competency, and Implications for Quality Care" was presented by Robert Like, MD, MS, Director, Center for Healthy Families and Cultural Diversity, Robert Wood Johnson Medical School.
- In collaboration with the Akron Office of Minority Health and the Minority Health Roundtable, Summa hosted two conferences on cultural competency and implementing Culturally and Linguistically Appropriate Standards (CLAS). Josepha Campinha-Bacote, MD, Ph.D., MAR PMHCNS-BC, CTN, FAAN, presented "The Journey toward Cultural Competency in Healthcare Delivery: A Model of Care" and Guadalupe Pacheco Jr., MPH, MA, presented "Implementing CLAS in Healthcare."
- Developed and began implementing a Diversity and Inclusion Strategic Plan to focus on five areas: leadership commitment and involvement, employee involvement, talent management (recruitment, retention, development, advancement), economic/supplier diversity, and diversity training and education.
- Developed and presented a session on diversity and disparities as a part of the resident orientation program.

## Community Reinvestment

- Assessed volunteer program at Summa Akron City and Summa St. Thomas Hospitals, determining strengths, needs and opportunities.
- Achievements in Summa's "Pay it Forward" employee volunteer program include a 29% increase in volunteer participation for the Akron Reads program for the 2009/2010 school year; the completion of two service projects for Haven of Rest and Goodwill Industries on "Make a Difference Day" national day of service; and the successful fulfillment of "Read to Me Day" at Case Elementary School.
- Implemented employee events focused on supporting community needs of homelessness and hunger; proceeds from these events benefited Haven of Rest and Harvest for Hunger.

# Government Relations & Health Policy

Continuing to advance Summa's presence at regional, state and federal levels, the Department of Government Relations and Health Policy worked to further discussions related to healthcare administration, delivery and financing opportunities.

## Advocacy and Health Policy Planning

- Executed evaluation process to determine which relationships with advocacy organizations should be preserved or modified going forward.
- Developed overarching policy to guide how the organization responds to policy and political issues and opportunities.
- Engaged board of directors and employees in advocacy efforts related to state franchise fee.
- Participated in health policy planning process at federal level. System leadership interacted with relevant health committee and agency leadership on issues related to physician-system joint ventures, Medicare Advantage and health information technology.
- Provided feedback to draft state medical home demonstration legislation. Summa feedback was incorporated into latest draft.
- Implemented two continuing education opportunities related to health policy: a presentation for physicians in August and another for select private and public sector leadership in November.
- Advanced public funding requests for system. Funding requests for the Center for Minority Health and Health Disparities Solutions (\$250K) and Austen BiInnovation Institute in Akron (\$1M) were approved by a federal appropriations process.
- Supported advocacy plans for local Access to Care (ATC) initiative. ATC slated to receive significant public sector support to maintain healthcare services for Akron's uninsured community.
- Connected system to Summit County MRDD to create new dental access point for developmentally disabled patients.
- Helped secure strategic placement of system leadership with health policy boards and committees – Chuck Alderson, chief financial officer, Summa Health System Southwest Region, was appointed to Ohio Hospital Association Finance Committee and Dr. Teresa Koenig, MD, MBA, senior vice president and chief medical officer, SummaCare, was appointed to Ohio Health Quality and Coverage Council.

## Health Policy Communications

- Completed White Papers for Strategic Areas of Focus. White Papers will be utilized to support fund development and advocacy planning process.
- Launched legislator leadership series for Summa executives and management, hosting state senators Armond Budish in May and Tom Niehaus in November.

- Supported focused communication efforts to elevate Summa's voice in healthcare reform debate:

- Medicare Advantage (Modern Healthcare, Managed Care Executive)
- House Calls Program (New America Foundation blog)
- Franchise Fee (Akron Beacon Journal)
- Summa Health System Health Policy Positions Document
- CEO Reaction to Healthcare Reform (Summa Intranet, Summa Website)

## Workforce Development Support

- Provided leadership and support to workforce development initiatives:
  - Regional allied health workforce two-part summit
  - Health system involvement with Chrysler Transition and Ohio Skills Bank efforts
  - Health system involvement with WVIZ/IdeaStream Health Careers Programming to engage high school students across the state