Thank you for supporting the Indiana University Health Foundation. I am extremely proud to report on the many accomplishments of 2018, our inaugural year.

The biggest news is that the Foundation raised more than $19 million in 2018, more than triple (and nearly quadruple) our goal. This shows me that the people of Indiana (and beyond) are with us in our mission to make Indiana a healthier state.

As proud as I am of the $19 million the Foundation raised this year, the number I am happiest to report is this: $0. Zero dollars were spent on our administrative costs, such as salaries and office space, which are absorbed by IU Health. This means every dollar, every cent, contributed by donors, supports the health of our patients, our communities, and our state. We disbursed more than $10 million in 2018.

On the cover: Gwen Brack. Her IU Health doctors used Precision Medicine to find an elegant therapy for her stage 4 colorectal cancer: an aspirin a day.
2018 was a building year for the new Foundation. We worked in 2017 to integrate individual foundations within IU Health into a bigger, stronger foundation that can attract the transformative gifts IU Health needs to improve Hoosiers’ health. While honoring the intentions of past donors and historic philanthropic relationships, the new Foundation takes advantage of synergies and efficiencies created through integrated work. Our staff size doubled, meaning we can devote people to areas that require deep understanding, such as planned giving. And we can ensure that local stays local: your gift goes where you want it to go.

With this stable infrastructure in place, we can move on to raising and disbursing the funds that are desperately needed to address our state’s health challenges. In the past year, Indiana’s health ranking fell from 38 to 41, driven by factors including high smoking rates, children living in poverty, and increases in the rates of cancer and mental distress. These social determinants of health call for action that extends far beyond the walls of our hospitals. Telehealth, for example, ensures that even people living in Indiana’s remote rural areas can access outstanding IU Health care from their home or their local hospital. Telehealth is expensive, but philanthropy can make it a reality for even those Hoosiers living down winding country roads. As the state’s largest healthcare system, IU Health has a unique responsibility to tackle these problems—and with your help, we will continue to do so.

Read on for positive news in our three focus areas of people, progress and partnerships. For collaborations that bring together clinicians and community. For programs that recruit and retain top caregivers. For technological advances and practical solutions that ensure patients in every corner of our state can access outstanding care. For solutions that give people hope. For glimpses into the opportunities made possible by philanthropy.

In short, thanks to people like you, the Foundation’s first year was a big success. And we’re just getting started.

Gratefully,

Crystal Hinson Miller
President, IU Health Foundation
Chief Philanthropy Officer, IU Health

Indiana University Health Foundation Board of Directors

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Shelly Schwarz, philanthropist, board member of Indiana University Varsity Club
Deborah Tobias, retired, Juniper Networks and co-founder, Tobias Family Foundation

100%
IU Health Foundation board members who gave in 2018
30,406
Number of gifts to IU Health Foundation in 2018, its first year

89%
Increase in number of IU Health team members who donated in 2018 to the annual employee giving campaign

$19,070,185
TOTAL CONTRIBUTIONS IN 2018
48
Team members recognized in 2018 through employee recognition programs funded by philanthropy

800
Teddy bears given in 2018 to children experiencing treatment at IU Health Arnett Hospital

200
Patients responded to by Mobile Stroke Treatment Unit, based at IU Health Methodist Hospital, in first eight months of use

100%
IU Health Executive Leadership Team members who gave in 2018

10
Mama Roo swings and 150 swaddle blankets to the IU Health Bloomington Hospital NICU, courtesy of Project Sweet Peas

25
New Inspiring Leaders, bringing the total alumni in this young professionals group to 150

1,289
Pounds of prescription drugs collected in philanthropy-funded drug-takeback boxes

2,425
First-time donors to IU Health in 2018; 88 percent increase over 2017
## Income sources

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major gifts</td>
<td>($11,026,646)</td>
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<tr>
<td>Government grants</td>
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<tr>
<td>Events</td>
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<td>Annual fund</td>
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<td>Other (third-party, gift shop)</td>
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</table>
Disbursements

**PEOPLE:**

$3.1 million
Salaries plus education and expenses of people in philanthropy-supported positions, such as fellowships and program directors

**PROGRESS:**

$5.5 million
Cutting-edge equipment and costs for philanthropy-supported research and innovation

**PARTNERSHIPS:**

$1.6 million
Grants distributed statewide plus sponsorships of fundraising events
Philanthropy funds recruitment and retention programs to help attract and keep the very best team members, because a strong workforce equals outstanding care.
Within the next decade, the U.S. could experience shortages of up to 63,700 physician specialists and 1.1 million nurses. As the state’s largest healthcare provider, IU Health could be hit hard. But the IU Health Foundation is already working to secure funding for programs that will help IU Health recruit and retain people to reverse the trends. One such program is the IU Health Leadership Academy, a destination hub for local, regional and national top talent. Programs will foster collaboration, combat burnout and create mentoring programs.

Mentoring and sponsoring diverse talent are critical to strengthening the existing workforce and luring top talent, according to Eva Marquez, executive director of marketing for IU Health System Clinical Services. Marquez said, “We are here to make Indiana one of the healthiest states in the nation, but we won’t be able to do this unless we ensure that the next generation of leaders reflects the diverse populations we serve.”

The best mentors, she knows from personal experience, are people who are different from the mentee, which is why diversity in such relationships is important. “If you make me think in a way that I haven’t considered before, you have a different perspective—that’s who I want to sit down with. Otherwise, you start having blind spots,” she said. “IU Health has leadership development programs and affinity groups, but the piece that could make this effort even more effective is personalization, a personalized approach to developing others, to help them think bigger.”

Donors who recognize the importance of mentoring and professionalism are supporting initiatives such as the IU Health Leadership Academy, through gifts to the IU Health Foundation.

“Diversity of thought starts taking down some of the intrinsic biases we all have,” said Eva Marquez.
Environmental Services (EVS) workers are key to infection prevention, patient satisfaction and patient flow in IU Health hospitals, yet in downtown Indianapolis hospitals, for example, the first-year turnover rate among the EVS staff is 75 percent.

Parveen Chand, chief operating officer for IU Health Methodist and University hospitals, turned to philanthropy to change that. He secured a $208,000 Foundation grant that will fund a two-year career guidance pilot program at Methodist and University hospitals. Kelvin Wade, director, Patient and Visitor Services for the Academic Health Center, will administer the program.

Wade started at IU Health Methodist when he was just 18 years old, and he now oversees 450 employees at IU Health Methodist and University hospitals. He leads patient transportation, environmental services, guest relations, volunteer services, language services and much more.

In the new program, a social worker will work with entry-level EVS staffers to address personal barriers to maintaining employment (such as transportation and childcare), and help employees recognize their potential and pursue career paths of interest.

“Mentors helped me get to where I am, and I am eager to do the same for others,” said Wade. “My thanks to the Foundation for funding what could become a national model for retaining and promoting these highly valued team members.” ✿
On some days during the last couple of years, Javier Perez had so much trouble breathing that he wanted to stop breathing altogether. The New Carlisle, Ohio man even thought of ending his own life.

Diagnosed with pulmonary fibrosis, Perez eventually had a lung transplant performed by David Roe, MD, medical director of Lung Transplant and ECMO at IU Health Methodist Hospital. But Roe shares credit for saving Perez’s life with a colleague who never wields a scalpel: Danielle Henderson, PhD.

Henderson was the inaugural IU Health Lung Transplant Psychology Fellow, a one-year position funded by philanthropy. In that role, she helped patients through the anxiety and depression that often accompany a transplant. Perez, a father of three, said he never smoked and never was sick a day in his life. Finding himself with a life-threatening illness was overwhelming.

“It was hard to handle the whole thing,” said Perez, who owns and operates a diesel diagnostics firm. “Dr. Henderson kind of let me blow off steam, the anger that I had, the hopelessness. It helped me hang on.”

Henderson’s position was funded for just a year, and she has moved to a faculty position at the IU School of Medicine. Meanwhile, the IU Health Foundation continues to seek donors to put people in fellowships and other roles that could be viewed as “non-critical.” But Perez knows that Henderson was critical to him.

“I’d rather be here than not be here,” he said.
Chuck Merriman had a great idea: give a cash award to recognize the kind of dedicated IU Health team members who eased his wife Lynda’s seven-month battle with cancer at IU Health Simon Cancer Center and University Hospital.

Then he had an even better idea: expand the program statewide. Thanks to his generous gift, the award—henceforth known as “the Lynda”—is a valuable tool in recognizing and retaining standout staffers. ✧
When Marya Jones sings the praises of IU Health to prospective donors, she’s singing from the heart.

Sure, as director of planned giving for IU Health Foundation, it’s Jones’ job to help people include the Foundation in their wills and other long-term giving plans. But, because Jones has personally benefited from the way IU Health helps families through trials and tragedies, her job is also her passion.

IU Health (or, in earlier years, Methodist Hospital) was there to nurse one of Jones’ brothers through a serious illness at a young age, when her grandparents needed care in a new town, when her mother had a sudden illness, when her father fought terminal cancer, and when her husband of only three months was mortally injured in an auto accident.

Today, a quarter of a century after her husband passed away, Jones still tears up talking about the way the IU Health team rallied around her and guided her through her grief. “When things like that happen and people are that kind, you don’t forget,” she said.

Integrating several foundations at IU Health hospitals into one bigger Foundation has allowed the addition of a staff member dedicated to the intricacies of planned gifts. As an attorney who has spent the bulk of her career working in estate planning, Jones brings a sound professional perspective to her work. She also brings compassion for families who want to give back.

“My whole career has led me to this,” Jones said. “I can’t write a million dollar check, but I can help others see the impact of their gifts so that my story can be multiplied by thousands across the state.”
Charles Boling, a U.S. Air Force veteran and retired history teacher, was already experiencing Parkinson’s Disease, when he suffered a crisis with kidney disease in 2016. His daughter Elizabeth and her siblings Daniel and Malinda were advised to seek hospice care.

Elizabeth Boling, a professor at Indiana University Bloomington and the closest to her father geographically, sought help from IU Health Bloomington Hospice. “Hospice saved our lives,” she said.

For 20 months, Boling was continually impressed by the many ways hospice staff exceeded her expectations. Their first act was installing a hospital bed for Mr. Boling’s safety, then acquiring and installing a lift for caregivers to use when moving him. Elizabeth Boling said hospice staff provided comfort, solace and strength at every stage of this uncertain and exhausting journey.

“The folks who worked with us clearly cared about my father,” she said. “They talked to him as a person, not just another sick old man. It was clear that they cared about the quality of his life down to the last day of it.”

When their father passed away in October 2018, Elizabeth Boling and her siblings gifted $10,000 from his estate to IU Health Bloomington Hospice.

Bloomington Hospice is the oldest and largest provider of end-of-life services in South Central Indiana, and the only remaining not-for-profit hospice in the region, meaning it provides care for people who otherwise couldn’t afford it. Donors in the South Central Region are especially generous in their support of hospice care through the Light Up a Life Campaign. Their contributions take many forms, including memorializing loved ones and recognizing hospice staff. The campaign culminates with the holiday lighting of a Hospice Tree on the Monroe County Courthouse lawn.
IU Health aims to be a destination for professional nurses who want to learn and grow their careers. To achieve that, IU Health has instituted a Distinguished Nurse Excellence program. The new program, kicking off in 2019, ditches the traditional clinical ladder approach to career advancement in favor of a fresh and inclusive view on professional development, engagement and recognition.

Designed by our nurses for our nurses, the Distinguished Nurse Excellence program recognizes nurses for their commitment to patients and the profession, and supports ongoing professional development, including mentorships and professional organization membership. Distinguished nurses will lead special projects and be supported to publish and present their work at conferences across the nation.

“As a profession, nurses are accountable to own their professional engagement and to maintain relevancy. Traditional programs are no longer serving the needs of our multigenerational workforce,” said Michelle Janney, PhD, RN, executive vice president and chief operating officer for IU Health. “The Distinguished Nurse Excellence program aligns with the wants and needs of a modern nursing workforce—recognizing the unique contributions of IU Health nurses and supporting individual career goals, while showcasing the best of the best here at IU Health and on a national stage.” Janney has made a generous donation to support nursing excellence.

With funding, nurses will also participate in exchange programs, where they spend time at a non-IU Health hospital to learn and share contemporary nursing practices.

The Distinguished Nurse Excellence Program is funded for its first year, and the IU Health Foundation is seeking funding sources to sustain the program.
“We create the environment of excellence and ask people to aspire to it, and they do,” said Michelle Janney.
Progress

Philanthropy funds innovations, so patients with complex disease (and the people devoted to finding new ways to treat them) don’t have to leave Indiana.
Joe Schwarz was a hard-working entrepreneur who achieved the American dream and had an enormous sense of gratitude. When he died in March of 2018 after a second battle with cancer, his widow Shelly Schwarz wanted to honor his grateful spirit and recognize the care he received as an IU Health patient. She committed $10 million to establish the Joe and Shelly Schwarz Cancer Center at IU Health North Hospital.

Schwarz’s gift represents the largest single gift to date to IU Health from a living donor.

“We have witnessed firsthand how devastating cancer can be to the person going through it, as well as their loved ones,” said Schwarz. “The Joe and Shelly Schwarz Cancer Center is going to be an all-in-one facility with the best doctors, the best equipment, and a lot of the extras that add to cancer care.”

The Joe and Shelly Schwarz Cancer Center will make it possible for more people to access the renowned care offered by IU Health. Under one roof, the center will offer radiation oncology spaces and infusion rooms, plus support services including a pharmacy and laboratory. The center will cost $55 million and will open in 2020.

Also planned, but not yet funded, is an Integrative Health and Wellness Center to offer programs including art, music and yoga that benefit patients and their caregivers.
Inspired by Shelly Schwarz, Tag Birge and Bob Whitacre also found a way to honor Joe Schwarz’s spirit and memory.

Birge and Whitacre have known each other for three decades, as partners in a successful business, friends, and, in a sense, family. The men co-own Cornerstone Companies, Inc., a healthcare real estate investing firm based in Indianapolis. They both knew Joe and Shelly Schwarz, too—Whitacre as a neighbor in Florida, and Birge by marriage to the Schwarzes’ niece, Marta. Whitacre had been through treatment for the exact type of throat cancer Joe Schwarz had.

When Joe Schwarz died, Cornerstone Companies and the Birge family pledged $110,000 to add a courtyard to the Joe and Shelly Schwarz Cancer Center, where patients and families can sit and rest, take a breath, and enjoy being surrounded by nature.

For Birge and Whitacre, the donation is a way to remember Schwarz, but it’s also a way to live out their company’s values.

“One of our core values is caring,” said Birge. “When I saw the generosity of Shelly’s gift, I thought this was an opportunity to live our culture. This became our symbol of caring — helping those who are battling cancer.”

“Cancer is harder on the family than on the individual,” Whitacre said. “As the individual who had cancer, I was able to devote all my time and effort to beating the disease. My family wasn’t in that position. They had to live through that process.”

Shelly Schwarz’s gift of $10 million honored her late husband Joe and his sense of gratitude.
The technology needed to create a “smart” hospital is much more complex than, say, a smart light bulb or smart furnace. But the idea is the same: using futuristic technologies to make our healthcare environments more efficient and effective. Smart hospitals will feature not just new devices, but better record-keeping and sharing, faster and more accurate diagnoses, and better outcomes for patients.

Philanthropy is critical to funding hospitals of the future. The IU Health Foundation serves in an advisory role to help innovators find financial support for tech advances.
The proven benefits of creative arts therapies were demonstrated during the inaugural CompleteLife Art Show sponsored by Roche Diagnostics through a donation to the IU Health Foundation. The show, mounted first at the IU Health Simon Cancer Center, then moved to the Roche Diagnostics building in Fishers, Ind., featured paintings, drawings, collages, sculptures and mixed-media pieces, on the theme of “Strength. Courage. Creativity.”

Much of cancer treatment focuses on the body—but art therapy goes beyond just the physical to provide additional care for mind and spirit. Art therapy allows patients, loved ones and other caregivers to work through feelings that are difficult to verbalize, and it gives people a sense of control while reducing anxiety and depression.

CompleteLife is a comprehensive therapy program serving patients and their caregivers at the IU Health Simon Cancer Center and IU Health University Hospital. It offers art therapy along with appearance consultations (including wigs), massage therapy, music therapy, support groups and yoga. IU Health seeks donors who would allow expansion of these therapies to additional locations—including the Schwarz Cancer Center at IU Health North Hospital—and to illnesses beyond cancer.
Philanthropy allowed IU Health to launch the state's first Mobile Stroke Treatment Unit in 2018, one of about 15 in the nation.

Time is of the essence when a stroke happens, so it makes sense to rush treatment to the patient’s location, conduct a CT scan and, if needed, give clot-busting medicine on the spot. The mobile unit is staffed at all times with a neurologist, a nurse, a CT technician, a paramedic and an EMT. Inside is a CT scanner—exactly like those found in the neurology intensive care unit—plus a mobile lab for evaluating blood work and four cameras to collect images.

In its first eight months, the new unit responded to about 200 patients, according to Jason Mackey, MD, an IU Health neurologist and key player in getting the Mobile Stroke Treatment Unit up and running. Mackey estimates that the mobile stroke unit saves, on average, at least 30 minutes of response time. And time saved means fewer people in nursing homes and fewer lives lost to stroke.
A person like Donald Farnsworth is almost a cliché in philanthropic tales: a hard-working farmer who never married, lived a simple life, then left remarkable gifts when he died.

Farnsworth’s estate included more than $330,000 to IU Health White Memorial Hospital. (He also made a gift in the 1950s to help establish the original White County Memorial Hospital.) According to people who settled his estate, he had survived scarlet fever as an adult and recognized the importance of access to quality medical care in the rural area where he lived.

The Foundation is grateful for this unassuming man and his commitment to look out for the medical needs of his neighbors, long after he is gone.

The IU Health Mobile Stroke Treatment Unit is equipped and staffed to serve as a neurology ICU on wheels.
Partnerships

Philanthropy makes possible collaborations and connections, inside and outside IU Health, to advance the health of all and address Indiana’s biggest public health concerns.
Patients exhibiting a substance abuse problem when they arrive in an IU Health emergency room can immediately talk with someone who has shared a similar experience. “I can say, ‘I know what you’re going through. I’ve been in that bed,’” said Sarah Stillerman, CAPRC, lead recovery coach.

Stillerman is one of a team of specially trained coaches (four in place now; eight when the program is fully operational), who video-chat with patients who exhibit signs of substance use disorder, no matter why they were admitted. As someone in recovery from alcohol use disorder, she uses her own story to connect with patients and gain their trust.

“My initial goal is to remove any barriers they may be facing, basic needs such as a place to stay, transportation, food—or acknowledging that they have a substance use problem,” she said. “Then I follow up a couple of days later, just to ask ‘How’s it going?’ She continues to check in and direct patients to resources for an entire year.

In 2018, the IU Health Foundation secured a $1.4 million award for IU Health to provide peer recovery coaching services at IU Health emergency departments statewide, onsite and via telehealth, so coaches are available 24/7. The service was introduced at IU Health Frankfort.

Stillerman, who started volunteering at recovery events after becoming sober, then made recovery her career, is grateful. “I get to use my life story to give back,” she said.

Assisted by philanthropy, IU Health has an aggressive five-year plan to address Indiana’s behavioral health challenges. IU Health Tipton Hospital hired a clinical psychology intern thanks to a $12,000 gift. A team in Bloomington virtually “sees” substance abuse patients at IU Health Morgan. And Morgan as well as IU Health West Hospital launched intensive outpatient and medication-assisted treatment programs.
For many patients, home is better than a hospital. IU Health offers its Virtual Care Program to patients like 93-year-old Marie Kenley, who has congestive heart failure. Via telehealth, she can get the monitoring and care she needs in the comfort of her own home.

Kenley takes her blood pressure, weighs herself, and uses a pulse oximeter to check her heart rate and oxygen saturation. She pushes yes or no buttons on a machine that transfers her data in real time to a team of virtual nurses. If anything unusual comes up, a nurse contacts Kenley and talks her through symptoms and next steps.

Expanding this program to more patients, with different conditions, will require the help of philanthropy. The IU Health Foundation seeks donors to help redesign the way healthcare is delivered. ✿
People in Central Indiana are better equipped to reverse an opioid overdose thanks to a naloxone giveaway and training on Sept. 28, 2018.

IU Health and the IU Health Foundation partnered with Indiana University, Overdose Lifeline and the Indianapolis Public Library to host the sessions at IUPUI and four Indianapolis public library branches. More than 400 kits were distributed that day, in keeping with the U.S. Surgeon General’s advisory urging all first responders and the family and friends of people with addictions to carry the life-saving medication. As the state’s largest healthcare system, IU Health is on the front lines of addressing substance use disorders.

Collaborations are critical to addressing Indiana’s biggest health challenges, including the opioid crisis.

PHOTO CREDIT: LIZ KAYE, INDIANA UNIVERSITY
The Indianapolis Motor Speedway and IU Health share a long history, dating to 1910, when the first motorized ambulance at the track stood at the ready to take people to IU Health Methodist Hospital.

In recent years, that history has been honored at Rev, the signature event of the Foundation, sponsored and staffed by many invaluable partners. Held on the Speedway’s grounds every May, Rev in 2018 netted more than $560,000 for critical care and trauma programs statewide. Attendees voted on proposals for how the funds would be used.

The winning proposal, 911: Access Trauma, is improving logistical and communications procedures statewide so emergency responders can act more quickly and effectively with patients in life-or-death situations. The proceeds are also providing trauma education to more IU Health team members and funding a new ambulance for the IU Health South Central Region. All this ensures that no matter where someone is in Indiana, they can access IU Health trauma care. Net profits of nearly $2.6 million from previous Rev events were used to buy products such as medical equipment and fire-safe clothing, and to provide educational programs to medical staff and schoolchildren. ✦
IU Health Tipton Hospital lacked a social worker to ease patients’ transition to home, until philanthropy stepped in. The hospital used philanthropic funds to hire Julie Miller, a 30-year veteran, and to provide seed money for a patient assistance fund. Miller uses these funds for patient necessities such as gas cards to travel to follow-up appointments and equipment such as walkers.

“It is an honor to be part of patients’ lives,” said Miller.

What started as a pilot project is now permanent. The hospital pays Miller’s salary, and the patient assistance fund has grown thanks to contributions—many from team members who no longer have to dip into their own pockets to send patients safely home. ♦
Scott Hilliard, DNP, director of clinical operations (left), and Steven Roumpf, MD, medical director (right), led Sarah and Mac McNaught on a tour of the renovations.
Nearly 60 percent of patients admitted to IU Health Methodist Hospital in 2018 entered through the emergency department. Now, patients and their families are seeing a brighter space with updated functionality due to a $100,000 gift from Sarah and Mac McNaught.

Sarah serves on the Philanthropy Council for the Adult Academic Health Center, and spent the previous 10 years on the board of the Methodist Health Foundation, precursor to the IU Health Foundation.

“My volunteer experience has been eye-opening and rewarding, and Mac and I are happy to play a part in this emergency department renovation,” she said.

Upgrades in the department include new work stations for nurses and physicians, and fresh paint, flooring and lighting in the 35 patient rooms. Now, thanks to the McNaughts, the department reflects the outstanding care delivered there.

The end of 2018 saw another milestone: the integration of IU Health Jay Hospital’s philanthropic efforts into the IU Health Foundation. Though the Foundation has much to celebrate after its first year, this was a reminder that we still have much work to do, in healthcare and in the related components of overall wellness, including socioeconomic factors, health behaviors and physical environment.
IU Health Foundation was proud to partner with the following donors during 2018:

**Gift of $10,000,000**
Shelly Schwarz

**Gift of $500,000**
Anonymous

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- Donald Farnsworth
- Indianapolis Motor Speedway
- Cynthia Simon Skjodt and Paul Skjodt
- The Samerian Foundation

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