

FALL | 2020



Giving



The Perfect Partnership

**JoAnn and Bob Glick
and MetroHealth**

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Donations Strengthen MetroHealth's Response to COVID-19

The COVID-19 pandemic, which continues to impact everyone on many levels, also continues to generate an outpouring of support from donors throughout the community.

Since March, MetroHealth has received nearly 180,000 pieces of equipment valued at more than \$250,000; more than 5,000 cloth masks that have been distributed to patients and families in need; and more than 13,000 meals and snacks for our front-line and other essential staff.

In June, the MetroHealth COVID Hotline received a tremendous boost when the Mandel Supporting Foundation (through the **Jack, Joseph & Morton Mandel Foundation**) gave the MetroHealth Institute for H.O.P.E.™ a \$250,000 grant to ensure that the hotline would remain operational through the end of 2020. Since March 13, the hotline has fielded more than 36,000 calls, half of which turned into physician telehealth visits, from individuals unsure if they should seek medical attention for symptoms associated with COVID-19.

"For many of us, taking calls on the COVID line has been the most meaningful work of our professional lives," said primary care physician Dr. David Margolius, who has been leading the hotline effort from the clinical side. "We are so grateful to The Mandel Foundation for helping to support this work."

More than \$600,000 – including a \$500,000 gift sent in September by an anonymous donor – has been given to support front-line caregivers and other employees. In addition to providing meals and respite care, these donations are being used to ensure that employees have access to affordable childcare. Eligible employees are being offered a childcare subsidy through a partnership with Urban Community School (through December 2020, if needed) or a grant through MetroHealth's Employee Emergency Hardship Fund to help pay for childcare elsewhere.

MetroHealth also is using donations to meet the increased demand for nursing assistants by covering the cost of up to 16 employees for STNA training in partnership with Cuyahoga Community College.

And in October, **Bank of America** awarded the second of two grants totaling \$125,000 to the Institute for H.O.P.E.™ to support its home delivery service program, which is delivering food and other essential items to patients who have been impacted by COVID-19. The most recent grant will be used for the lease of a van for the home delivery program as well as to support the salary of a new position that would navigate and refer residents to community-based organizations for social service needs.

If you would like to contribute to our continued COVID-19 response, go to metrohealth.org/foundation/donate.

Medical Mutual Makes Its Largest Gift to MetroHealth with \$1 million Pledge

Medical Mutual of Ohio recently made a \$1 million pledge to MetroHealth's Building for the Future Fund. The company has long been aligned with MetroHealth's mission, most recently providing significant support to the School Health Program and the Level I Trauma Center and Comprehensive Burn Care Center; and serving as a presenting sponsor of the MetroHealth GALA in 2016 and 2018.

The gift to the Building for the Future Fund is Medical Mutual's largest single commitment to MetroHealth to date. The company has directed its gift to the Fund so that it can support the MetroHealth Transformation in its entirety.

"This project is about building more than just a building. That excites us," said Rick Chiricosta, Medical Mutual chairman, president and CEO. "It considers the whole person, addressing some of the most basic of needs like affordable housing, proper nutrition, a clean environment, and access to reliable internet. Needs that, for many of our neighbors, have gone unmet for far too long."

"At Medical Mutual, we too are working to better address social determinants of health," he said. "The removal of these barriers is a critical component in creating a healthier community where people can thrive. We commend MetroHealth for this bold initiative and are proud to join them and many other community partners in redefining what it takes to ensure optimal health."



MEDICAL MUTUAL®

On the Cover: JoAnn and Bob Glick are standing on the 10th floor of the new hospital building, scheduled to be completed in spring 2022, at MetroHealth Medical Center.



In the fall of 2019 MetroHealth's philanthropic campaign, "For All of Us," had raised just over \$48 million. What a difference 12 months makes. Today, our campaign has met our \$100 million goal, and surpassed it ... two years early!

Our exciting process has been possible because of gifts of all sizes. Foundations like **The David and Jacquie Clark Family Foundation** (below); individuals like **JoAnn and Bob Glick** (page 4), longtime MetroHealth employee **Becky Moldaver** (page 6) and MetroHealth Foundation Board Member **Chuck Gile** (page 7); and corporate partners who have made unrestricted gifts to MetroHealth's Building for the Future Fund are all instrumental to the success of the MetroHealth Transformation.

\$103 MILLION RAISED TO DATE

\$100 MILLION GOAL

Clark Family Foundation's Gift Expands Services for Pediatric Patients

The **David and Jacquie Clark Family Foundation** has made a \$250,000 gift that will be used to help establish a unique space on the Pediatric floor of the new hospital for sensory-challenged children who are inpatients. The therapeutic, multi-sensory room will be a place where a child can engage with and respond to a variety of sensory experiences such as touch, sound, visual, spatial awareness, and motion. It will also be a place of refuge from the hospital room, which often can be overstimulating.



The multi-sensory room has long been a wish at MetroHealth, said Irene Dietz, MD, Director of Comprehensive Care in the Department of Pediatrics. "Often, patients with medical complexity do spend longer times in the hospital and may require admissions more frequently," she said. "They will greatly benefit from the space."

All pediatric patients – but especially those with neurodevelopmental or neurosensory disorders such as Autism Spectrum Disorder, Intellectual Disability, or even hearing impairment – will benefit, said Melissa Armstrong-Brine, PhD, a clinical psychologist in the Division of Child and Adolescent Psychiatry.

"We have built several successful outpatient programs for individuals with neurodevelopmental disorder (NDD), including our MetroHealth Autism Assessment Clinic, but had not yet really addressed the needs of inpatients with NDD," she said. "They are particularly vulnerable to the stress of the inpatient environment with its many unusual sights, sounds, smells, painful or frightening procedures and social demands."

The Child Life and Education Program team uses a variety of tactics (including bringing in special toys, playing music and regulating light in the patient's room) to provide sensory stimulation or relieve sensory overload.

The new sensory room will allow MetroHealth to better meet the needs of those children, Dr. Armstrong-Brine said. "We're discussing functional features of the room and developing ideas about what will be included. The gift has been a wonderful surprise and has opened up a lot of exciting opportunities."

If you are interested in learning more about the multi-sensory room, or if you would like to make a gift, please contact Lauren Gulley at 440-592-1403 or lgulley@metrohealth.org.

Thank You to The Supporters of MetroHealth GALA2020!

The generous sponsorship commitments to the fall event, which was postponed until 2022, have been directed toward support for the Building for the Future Fund:



\$100,000

MetroHealth
Medical Staff

\$75,000

KeyBank 
\$50,000

Fifth Third Bank: \$30,000

A.M. Higley Company: \$25,000

Tucker Ellis LLP: \$25,000

Bank of America: \$10,000

Clearstead Advisors LLC: \$10,000

Embassy Healthcare: \$10,000

Maloney + Novotny: \$10,000

RPM International Inc: \$10,000

RSM US, LLP: \$10,000

Bricker & Eckler LLP: \$5,000

Cleveland State University: \$5,000

Quadax Inc.: \$5,000

Zashin & Rich Co., LPA: \$5,000

Passion and Purpose Align for Glicks

On December 1, MetroHealth announced a \$42 million gift — the largest in the history of the health system.

JoAnn and Bob Glick wanted a partner that could align with their passions. As a nurse in inner-city hospitals in Philadelphia and Cleveland, JoAnn had seen America's health injustices up close: so many of her patients struggled with chronic health problems — diabetes, hypertension, obesity — that hit poor and urban populations the hardest.

"I saw us using all these resources in an uphill battle treating the sick," she says. "Why weren't we focusing on keeping people healthy?"

As JoAnn developed her passion for community health, Bob was building a retail concept that offered women, mostly in urban areas, stylish, well-made clothing and accessories. Best of all, almost every item was \$10 or less.

The concept, called Dots, was a hit. By 2011, he had 430 stores in 26 states and more than 5,000 loyal employees, who were 99% women and 75% minorities.

"Our best associates and store managers came from the neighborhoods where our stores were," Bob remembers. "They knew what our customer base wanted, because they were a part of it."

The payoff came in 2011, when Bob signed the paperwork to sell Dots to a private equity firm. The sale gave the Glicks, who'd always supported local charities, the means to do something transformative and the time to be strategic.

They wanted a partner that shared JoAnn's passion for community health and Bob's desire to focus on the Dots customer and associate base: women and their families.

Around that time, they began seeing articles about MetroHealth's dynamic and visionary president and CEO, Akram Boutros, MD, and hearing about the system's plans to shift greater focus and resources on keeping patients healthy.

They were intrigued — and embarked on a fact-finding mission. First, they asked their physician friends about the system.



In honor of the Glick's transformative gift, the new hospital building at MetroHealth's main campus will be named The MetroHealth Glick Center.



Bob and JoAnn Glick, right, listen to Jeff Abke, senior project manager at Turner Construction, left, during a tour of the new hospital building construction site.

"Docs at other systems, they all spoke highly of MetroHealth," Bob says.

They researched the history of MetroHealth, its mission, its programs, its people and its plans for the future. They engaged with caregivers and employees and observed how they serve their patients.

"Look what they're doing," Bob remembers thinking. "Look who they're serving. Look where their beds are. Look at the passion and commitment of everybody working there."

They'd found their partner.

In 2019, the Glicks made two significant gifts, to the MetroHealth Autism Assessment Clinic and to the SAFE (Students Are Free to Express) Project, an arts- and school-based mental health initiative.

Then this fall, they decided to go big.

The Glicks announced December 1 that they will be investing \$42 million in The MetroHealth System, by far the largest gift in the institution's 183-year history.

In honor of the Glicks' powerful philanthropic statement, the new hospital building at

MetroHealth's main campus will be named The MetroHealth Glick Center. None of the gift is being used for construction of the building.

The donation will be used to create two funds:

The JoAnn and Bob Glick Fund for Healthy Communities will support and nurture programs that promote the health and well-being of the underserved in Greater Cleveland with a focus on programs that address the needs of women and children.

The JoAnn Zlotnick Glick Endowed Fund in Community Health Nursing will recognize and support the role of nurses as leaders in improving the health and health care of the underserved in Greater Cleveland. The endowment, established at MetroHealth, will also support a professorship in Case Western Reserve University's Frances Payne Bolton School of Nursing, where JoAnn studied.

"I'd like our gift to change the dynamics of health care in our community," JoAnn says. "We need a strong Cleveland, with healthy children and families. That's our passion, and it's MetroHealth's mission."

The perfect partnership.



A registered nurse communicates through closed glass doors on the COVID-19 floor at MetroHealth Medical Center. —Photo credit: Joshua Gunter / Cleveland.com

Watch an Interview with the Glicks

See how their passion for giving back aligns with MetroHealth's mission at metrohealth.org/glick-gift.

Make Estate Tax Planning Part of Your Year-End Giving Plans

As unpredictable as the future is, an election year can bring much more uncertainty. This is especially true regarding existing tax policy, and proposals that might affect it. The estate tax exemption, often considered a political hot potato, is the highest ever this year at \$11.58 million for an individual (or \$23.16 million for a married couple). The Tax Cuts and Jobs Act (TCJA) enacted in 2017 raised the exemption on a yearly basis. If nothing is done to extend it and the law sunsets as planned, the TCJA will expire in 2025 and the estate tax exemption will return to a pre-2018 level of approximately \$5.5 million for an individual (or \$11 million for a married couple).

The estate tax could see a reduction as well, should new laws be enacted. Regardless of when and how the change happens, it is very likely that the estate tax exemption has reached its highest point until 2021. From an estate tax planning perspective, acting now may be as good as it gets.

You may want to consider revisiting your estate plan and, if necessary, transferring assets out of your estate by December 31. Transferring assets now with lower valuations – the result of the COVID-19 pandemic – allows you to shift more value out of your estate to maximize your exemption. The combination of low asset values and low interest rates also allows you to transfer assets to your beneficiaries at a much lower cost.

Please contact The MetroHealth Foundation at 216-778-5665 if you would like to discuss how you can include MetroHealth as part of your year-end giving plans.

This article was written by Jon W. Groza, a member of The MetroHealth Foundation Board of Directors, and Erika Flynn Apelis, partners at Kohrman, Jackson, and Krantz LLP. A version of this article appeared in the Estate Planning Guide issue of Crain's Cleveland Business on November 2.

In such an uncertain environment, some of the most common and effective planning techniques include:

- Family loans to take advantage of historically low interest rates.
- Gifts to family members or to Irrevocable Trusts to use some or all of your \$11.58 million (individual) exclusion.
- Gifts to an Intentionally Defective Grantor Trust that allows gifts to grow tax-free for your beneficiaries – typically children or grandchildren – while the grantor pays income tax on any income generated.
- Gifts to family members in excess of \$11.58 million at a gift tax rate of 40%.
- Spousal Limited Access Trusts (SLATs) that provide income to your spouse from assets gifted to the SLAT.
- Grantor Retained Annuity Trusts (GRATs) that provide an income stream from assets likely to appreciate over time.
- Charitable Lead Annuity Trusts (CLATs) that provide charitable gifts for years with the remainder passing to beneficiaries.

Volunteer Director's Steady Support for MetroHealth



Becky Moldaver

Becky Moldaver doesn't recall the first gift she made to MetroHealth. But once she started, she directed her giving to programs and services that addressed the need of older adults. Several years ago, she shifted focus. She became a "Sustainer" in MetroHealth's Employee Campaign – directing a portion of each paycheck be automatically deducted for the Building for the Future Fund that supports the MetroHealth Transformation.

"It's important to support the organization financially," said Moldaver, who joined MetroHealth in 1979 right out of college and has served as Director of Volunteer Services since 2002. "Over time, what's really inspired me has been all of the innovative things we were doing."

That innovation has spilled into Moldaver's duties as she and her staff have worked hard to change course in the wake of the COVID-19 pandemic. Forced to suspend nearly all volunteer activities inside the hospital, they have created new opportunities to assist the Trauma Recovery Center, the Food as Medicine program, the Institute for H.O.P.E.™ and others, with volunteers delivering food to people's doorsteps or checking in on patients with a phone call.

Those efforts, Moldaver said, are a good representation of what the MetroHealth Transformation is all about. Even as the new hospital building construction continues to progress, "seeing how MetroHealth's impact in the neighborhood has grown is also exciting."

If you are interested in learning more about MetroHealth's Employee Campaign, please contact Chantel Tolbert at 440-592-1397 or ctolbert@metrohealth.org.

THERAPY GARDEN

Sprouts from Idea, Becomes a Reality



Chuck Gile doesn't remember much from a fall that nearly cost him his life nine years ago. But he clearly recalls the walks he took with his physical therapist, Amy Lengyel. She patiently worked with him every day on his balance and endurance as they strolled the hospital hallways.

Those walks came weeks after MetroHealth's trauma team worked their magic on a badly broken man. Gile had suffered a cracked skull, broken collarbone and broken ribs. It was up to Lengyel to get Gile back on his feet. Drawing on the healing powers of nature, she recommended they take their walks outdoors.

"I didn't know it at the time but getting outside the walls of the hospital and into nature made a big impact on his recovery," she said.

Gile never forgot the care he received. Once he recovered and returned to work managing his two auto dealerships in Cleveland Heights, he tracked down Lengyel. Over lunch, she shared plans for a therapy garden she and her colleagues hoped to create one day. They wanted to give

patients the opportunity to be in nature with their families and with their caregivers.

That's where Gile came in. The project had a modest start with \$5,000 the team had won in a competition hosted by MetroHealth N.E.T. Gile agreed to provide the funds necessary to complete the project.

The Gile Family Therapy Garden opened on June 19 at the MetroHealth Old Brooklyn Campus. Tucked away in a lush courtyard, steps from the main entrance, the fully accessible garden provides a quiet oasis for patients and their families.

Gile, his wife, Georgia, and their adult sons and daughters-in-law served as co-chairs of MetroHealth GALA2016, which raised more than \$2.3 million. Since 2017, Chuck Gile has been a member of The MetroHealth Foundation Board of Directors.

"I'm really proud to be a part of the opening of this therapy garden," he said. "Amy's the one who had the vision for this, and I was very excited when she talked to me about it."

New MetroHealth Foundation Board Member

George Sullivan, CEO of Westlake-based **Equity Trust**, which he joined in March 2019. He brings more than 30 years of experience in the financial services industry, including as an executive at State Street Corporation for more than a decade. George is a graduate of Boston College.

New MetroHealth Foundation Staff Member

Karen Voytek, Operations Analyst. Karen has been with MetroHealth for more than 15 years, most recently as a Market Intelligence Specialist in the Department of Business and Strategy Planning. She has a bachelor's degree in Mathematics (with a minor in Finance) from Baldwin Wallace University.

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Employees Continue to Give Above and Beyond

As of November 12, 2020, employees have contributed \$18,755,903 in personal philanthropic gifts to the For All of Us Campaign. Gifts from employees are important and powerful because they demonstrate that those closest to MetroHealth invest in our mission themselves. As a critical component of the MetroHealth Transformation, philanthropy helps ensure we have resources for the care of our patients and our community.

Our employees show how much they care each and every day through their hard work and also through their generous giving to The MetroHealth Foundation. Because of them and all our supporters, we can continue to address the social and economic issues that impact the health and well-being of our patients and their families.



Thank You to Sponsors and Supporters of Gannon 2020!

US Communication and Electric, Inc. has redirected the first of three \$10,000 presenting sponsorship payments for the annual **John A. Gannon Memorial Golf Tournament**. The 2020 event was to have been held on September 14 but was canceled due to the COVID-19 pandemic. Pat and Jim Connoles, the company's CEO and COO respectively, decided to sustain support of the tournament by directly supporting the **Colonel Thomas C. McNeal Trauma Professorship in Trauma, Critical Care, Acute Care Surgery and Burns**.

Fourteen other corporate sponsors redirected their support to the endowed professorship that, in collaboration with Case Western Reserve University, will ensure MetroHealth's ongoing training of future leaders in trauma.