



MT. SINAI

HEALTH FOUNDATION

Mt. Sinai Forward: Blueprint for a Healthier Cleveland

MT. SINAI COMMUNITY PARTNERS, DONORS AND FRIENDS:

Mt. Sinai Health Foundation is nearing its 30th year of service to the Greater Cleveland community. At this time in our lifecycle, the Foundation has taken an opportunity we rarely take: To pause and take stock of our impact, reflect on lessons learned (in order to be a continuously more effective grantmaker), and chart a course for the future. Here, we lay out our strategic plan and the goals to advance our mission for 2025-2028, and also what has brought us to this point. As we implement our vision for a healthier Cleveland, we welcome your input and support.



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Mitchell Balk
President



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Co-Chair
Strategic Refinement
Task Force



Beth D. Rosenberg
Co-Chair
Strategic Refinement
Task Force

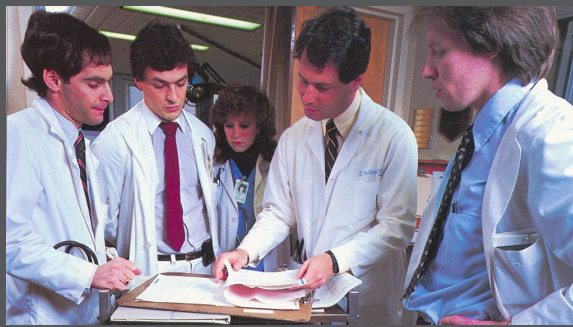
STRATEGIC PLAN

2025-2028

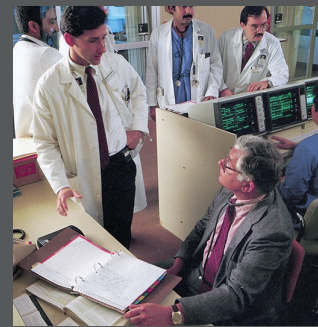




The Mt. Sinai Medical Center



Teaching rounds



Medical faculty collaboration

Our Legacy: What We Owe the Past

THE MT. SINAI MEDICAL CENTER

In June 1903, an institution destined to achieve a national reputation for medical excellence opened its doors to care for the people of Cleveland. That institution, Mt. Sinai Hospital, was established so that Jewish doctors — excluded from practicing at other hospitals in the area — would be welcomed. The hospital would serve the unique needs of Jewish patients, but its doors would be open wide for all in need. The hospital was generously supported through Jewish philanthropy, a commitment by the Jewish community that endures to this day through the Mt. Sinai Health Foundation. Not only did Mt. Sinai Hospital become a home to Jewish doctors and a superior teaching and research medical center, it was also among the largest private providers of care to the poor in Ohio. This, too, became a foundational plank for today's Mt. Sinai Health Foundation.

The Foundation's commitment to academic medicine and bioscience is also rooted in the former hospital, which was home to physician residencies and fellowships, the Mt. Sinai School of Nursing, and numerous allied health training programs. Mt. Sinai Hospital, which was affiliated with Case Western Reserve University School of Medicine, was part of Cleveland's international reputation for medical excellence and innovation. Medical education and the advancement of medical research into the cause and more effective treatment of disease became a focus of Mt. Sinai donors, reflecting the Jewish people's historic "love affair" with education and inquiry.

BIRTH OF THE MT. SINAI HEALTH FOUNDATION

In the mid-1990s, Cleveland's health care landscape experienced a significant transformation due to hospital consolidation and the emergence of for-profit hospital corporations in Northeast Ohio. Nonprofit hospitals found themselves at a crossroads during this time, leading to a number of new health-related grantmaking foundations that resulted from selling assets to for-profit corporations. Mt. Sinai became one of the largest grantmaking foundations to emerge during this pivotal era.

BUT FOR THE MT. SINAI HEALTH FOUNDATION....

In carrying forward Mt. Sinai Hospital's legacy since its founding in 1996, the Mt. Sinai Health Foundation is proud of its track record of success as the region's only major foundation exclusively dedicated to health and medicine. We are proud to have been leaders or partners in many communitywide initiatives, alongside making over 2,200 grants and investing \$160 million since our first grant cycle in 1997.

We have highlighted below some key initiatives where we are particularly proud to have played a significant role. These examples demonstrate our drive for measurable community health improvement — **From Grantmaker to Changemaker®** — a phrase that serves as our North Star, guiding us to increasing and enduring impact on Greater Cleveland.



YWCA Therapeutic Preschool



CWRU School of Dental Medicine



Mitchell Balk announcing the creation of the Lead Safe Cleveland Coalition at Cleveland City Hall, 2019

HONORING OUR JEWISH LEGACY

Mt. Sinai Health Foundation has stayed closely connected to its Jewish roots.

- We have been a steady and consistent supporter of the health needs of the Jewish Community through our annual grant to the Jewish Federation of Cleveland's Campaign for Jewish Needs. Since our first campaign grant in 1997, we have provided \$40 million to the campaign as a vehicle to improve the health of the Jewish Community, with millions more awarded to Federation and other Jewish agencies for projects that also address the health needs of Jewish Cleveland.

In the recent past, we have invested directly in Jewish organizations, including:

- Naaleh Cleveland's Naaleh Counseling Solutions (NCS), a mental health clinic offering local, culturally sensitive care.
- We were also a lead partner, together with Bellefaire Jewish Children's Bureau and Jewish parents of children on the autism spectrum, in the establishment of the Monarch School at Bellefaire, the region's first school to care for and educate children with autism spectrum disorders.
- Mt. Sinai is an ongoing funder of Bikur Cholim, which provides support to patients and their families during times of illness and medical crisis.

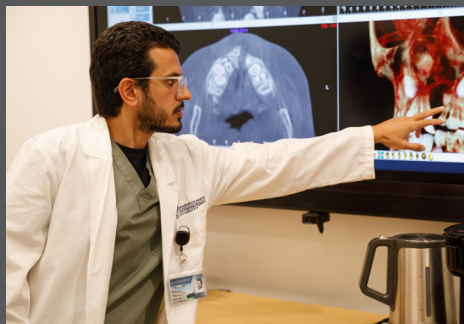
Strengthening Cleveland's Academic Medicine and Bioscience landscape

Building on Mt. Sinai's legacy and providing stewardship of its donor funds, the Foundation has made long-term investments to grow Cleveland's stature as a hub of medical education and innovation.

- In 2012, Mt. Sinai made the largest grant in its history, a \$10 million lead gift to Case Western Reserve University to build a new medical school teaching facility, coupled with a grant of the same size from the Cleveland Foundation, launching what has become the Case Western Reserve University/Cleveland Clinic Health Education Campus.
- This was preceded by a multi-million-dollar investment to create The Mt. Sinai Skills and Simulation Center, an educational resource for medical students and allied health professionals offering simulated patients and virtual reality training environments, at Case Western Reserve University School of Medicine.
- From 1998 to 2018, the Foundation worked to attract young, highly promising research stars in the basic sciences to Cleveland through the Mt. Sinai Health Foundation Scholars Program at Case Western Reserve University School of Medicine, providing \$12 million and attracting two dozen Scholars, and leveraging more than \$90 million in medical research grants from the National Institutes of Health.
- The Foundation was an early thought partner in Cleveland's Fund for Our Economic Future and BioEnterprise to support the growth of the biotech sector of the Cleveland economy.



Lead Safe Cleveland Coalition



Mt. Sinai - Reiter Fellow in Craniofacial Anomalies



Mitchell Balk, Rachel Oscar

Using Mt. Sinai's respected voice to inform Health Policy

Since Mt. Sinai's earliest days as a health grant-maker, we have invested time and resources in upstream policy measures to increase our impact beyond any grant we could possibly make. We have done so by educating policymakers and advocating for policy change that would improve access to health care or provide other health benefits for individuals who have no choice but to rely on government for their well-being, including seniors and Cleveland's youngest and most vulnerable families.

- In 2003, we partnered with other health-focused grantmakers from across the state to establish the Health Policy Institute of Ohio, a non-partisan resource for state policymakers in Columbus. The organization continues today to work on behalf of all Ohioans.
- The Foundation played a pivotal role in 2013 in supporting Governor Kasich's call to expand Medicaid through education and outreach activities so that uninsured Ohioans could obtain health care coverage. In its first year, over 700,000 Ohioans enrolled in the Obamacare Medicaid expansion.
- We also provided financial and other resources to the successful Right to Reproductive Freedom amendment in November 2023 to improve health and access to health care in our state. Mt. Sinai granted over \$1.1 million to support the initiative that protects access to abortion, contraception, and other vital health services for all Ohioans.

Convening others to address our community's most urgent needs

We have made a number of enduring investments in access to health care and prevention services across the community by leveraging the good work of our partners.

Making multiple long-term investments in Northeast Ohio.

- We leveraged funding from the Robert Wood Johnson Foundation to partner with the Center for Health Affairs and the Case Western Reserve University Frances Payne Bolton School of Nursing to launch Partners Investing in Nursing's Future, which grew nursing school faculty to allow schools in the region to admit additional qualified applicants.
- We partnered with MetroHealth Medical Center to bring Nurse-Family Partnership to Cleveland for the first time and convinced the State of Ohio and the federal government to fund the program. As a result of our ongoing commitment, some 400 first-time moms receive two years of nurse home visits prenatally until the baby reaches age two with the intention of reducing Cleveland's high infant mortality/ maternal mortality rates. The program has 30 years of evidence demonstrating lifelong benefits for both mom and baby.
- We provided a \$500,000 start-up grant to launch In Motion to serve Parkinson's Disease patients and families, because there is evidence that exercise helps delay the severity of the disease.



Nurse-Family Partnership: Home Visit



Governor John R. Kasich and Board Chair Marc C. Krantz celebrating Ohio Medicaid Expansion, at the 2013 annual meeting



Mitchell Balk at the CWRU-Cleveland Clinic Health Education Campus groundbreaking with Norma Lerner, Barbara R. Snyder, Toby Cosgrove, MD

Leveraging government/private sector partners to drive long-term change

Mt. Sinai Health Foundation has worked alongside government and private sector partners, where each sector leverages the other, and there is a sense of collective oversight and shared accountability. Children and seniors are among our community's most vulnerable populations, and we have invested heavily over the years, with partners, to improve outcomes for those populations.

Nowhere is this more evident than in Mt. Sinai's nationally recognized role in addressing lead poisoning in Cleveland. Approximately 25 percent of Cleveland's children have an elevated blood lead level upon entering kindergarten.

- In 2019, the Foundation played a crucial role in the launch of the Lead Safe Cleveland Coalition, a public-private partnership aimed at addressing lead poisoning throughout the city. The coalition boasts 500 individual members from more than 150 organizations and has led the way in attaining lead-safe certifications for nearly 38,000 rental units or one third of all rental units in the City of Cleveland.

- In 1998, we partnered with Cuyahoga County and the Cleveland Foundation, along with other grantmakers, to create Invest in Children, a public/private partnership to address the needs of Greater Cleveland's youngest, most vulnerable families. This initiative endures today and is one of many examples where we work directly with other influencers in the community to achieve impact at scale.

- After years of funding the former Transportation Consortium Coordinating Committee (TC3), and because we knew that model was unsustainable, we approached Cuyahoga County to plan a countywide system of senior transportation that would be safe, efficient and affordable into the future. A new non-profit, Senior Transportation Connection, was established and has been operating now for 20 years, with initial leadership also coming from the United Way Senior Success Vision Council.

- In partnership with City, County, health care, community and philanthropic organizations, we founded First Year Cleveland to work to reduce Greater Cleveland's high infant mortality rate.



Health Education Campus
Case Western Reserve University-Cleveland Clinic



First CWRU School of Medicine -
Mt. Sinai Scholar Ben Strowbridge, PhD

THE STRATEGIC PLANNING IMPERATIVE

We are now four years past our 25th anniversary. In anticipation of our 30th anniversary and with the addition of new staff and Board members, we committed to a robust process to explore future opportunities and invest in a collective learning process for Board and staff alike to ensure ongoing significant impact.

We retained **The Osgood Group, LLC** to work with us to design and facilitate a strategic planning process that would reach deep into the Foundation and our community, and also glean insights from a set of highly respected national experts. We have spent the last nine months conducting research and analysis, discussing the results and integrating the learnings that came from:

- Several retreats with Board and staff to define the Foundation's aspirations.
- Analysis of our grantmaking and human capital investments over the recent past.

- Interviews with:

All Board and staff.

Regional partners and experts to better understand our community's needs and how our external colleagues and partners view our strengths and ability to contribute at the highest level of impact.

Peer health-related grantmakers across the country to get a sense for trends and best practices around investments and approaches for defining health and delivering community impact.

The resulting fact-based reports and broad discussion and debate about those learnings among Board and staff have resulted in a new Vision, clarified Mission and newly articulated set of Values and Beliefs that guide our work, along with a set of focused Goals to advance our mission over the next three years.



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STRATEGIC PLAN 2025-2028





Mitchell Balk with Mt. Sinai Scholars, 2019



Mitchell Balk, Lisa Zwolinski at weekly staff meeting at team table



Bellefaire Adolescent Psychiatric Hospital (Bluestone) groundbreaking

VISION:

Greater Cleveland will be among the healthiest communities in the US.

MISSION:

The Mt. Sinai Health Foundation improves the health of Greater Cleveland by investing resources, convening, and collaborating — with a focus on:

- *Equitable Health Outcomes*
- *Health of the Jewish Community*
- *Academic Medicine and Bioscience*
- *Health Policy*

VALUES AND BELIEFS:

We are committed to honoring our Jewish legacy and Jewish values that have guided us from Mt. Sinai's earliest days and continue to ground our current and future decision-making.

- We carry forward Mt. Sinai Hospital's time-honored service to Cleveland.
- We are committed to stewardship of Mt. Sinai's donor funds.
- We are deliberate in how we engage our partners, staff and those we serve.
- We are relationship-forward and rarely seek to tackle problems alone.

- We seek the best talent – Board and professional – and we take every opportunity to recognize, develop and engage those resources.
- We engage people from the communities we serve to learn from their lived experience in order to better understand the community's needs, and we seek out respected voices from the community to guide us.
- We cannot do our work without our grantees and other partners, whom we actively identify and with whom we actively collaborate.
- We invest our resources to ensure the best possible outcomes for those we serve.
- We believe that focusing our resources on preventive and upstream measures will deliver the greatest impact (not health care, **health before care**).
- We prioritize key community opportunities that best leverage our skills and abilities.
- We look for opportunities to leverage our philanthropic resources to drive larger systemic and policy change.
- We believe improving health status is a long game, and we are willing to commit to initiatives we think will deliver impact over time.



Bellefaire, Home of the Monarch School for Autism



YWCA Therapeutic Preschool



Program Officers Rachel Oscar, left, and Shelby Kaemmerer with Mitchell Balk at grantee site visit

STRATEGIC PLANNING GOALS 2025 - 2028

GOAL 1: Define ‘health’ for Mt. Sinai Health Foundation’s Equitable Health Outcomes and Health Policy grantmaking areas to guide investment of time and resources to ensure ongoing impact.

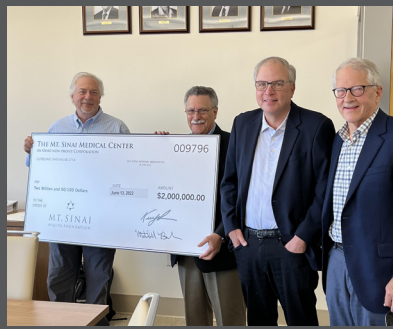
Rationale: The initial impetus for this strategic refinement process was to help the Foundation define its focus within the ever-broadening national conversation on the definition of health. Board and staff alike were concerned about long-term dilution of grantmaking impact and human resource deployment given the generally accepted belief of recent years (which the Foundation strongly supports) that health is about so much more than what is provided in a clinical setting, and, in fact, involves almost every aspect of daily life. However, Board and staff recognize that more specifically defining health at the mission level would be limiting. Instead, we are creating a “filter” to help us focus on our ‘sweet spot’ for impact — where broad national definitions of health and the many factors that impact it (as described in the federal government’s Healthy People 2030), Ohio’s needs (as defined by the State’s regular health assessment), Greater Cleveland’s needs (as defined by Cuyahoga County’s regular Community Health Needs Assessment & Community Health Improvement Plan) and the Foundation’s funding priorities, skills and external conditions converge. The staff has already made significant progress on the filter, and the Board understands and supports it. We anticipate that the filter will be modified to align with our three-year goal-setting planning cycle.

GOAL 2: Build Board consensus and a shared understanding around annual and special giving to the Jewish Federation and grantmaking to the Jewish community, ensuring that both components align with the Foundation’s vision, mission, values and beliefs and impact.

Rationale: Board interviews conducted during the fact base process revealed consensus around the need for ongoing support of the Jewish Federation’s annual Campaign for Jewish Needs and responsive grantmaking in support of Cleveland’s Jewish community at other Jewish-sponsored agencies. There was general recognition of the importance of these components, which are rooted in the Foundation’s Jewish legacy. Regardless of connection (past or present) to the Jewish community, Board members uniformly embrace the importance of this key area to the Foundation’s past and future. More actively discussing opportunities in the context of this ongoing commitment is important and should be a regular part of the Board’s agenda. Doing so in a deliberate way will ultimately strengthen the Board and its impact in the Jewish community.



Mt. Sinai Directors James A. Ratner, Marcy Schwartz, MD, Susan Hurwitz, Susan Ratner at Senior Transportation Connection



Mt. Sinai Leaders Ira C. Kaplan, Keith Libman, Kenneth G. Hochman, Zachary Paris closing down The Mt. Sinai Medical Center corporation, 2022



Mitchell Balk and Board Chair Susan Ratner receiving the CWRU President's Award for Visionary Achievement from President Barbara R. Snyder

GOAL 3: Increase impact in Academic Medicine and Bioscience by further defining our areas of focus and developing a long-term vision and funding plan that more fully leverages Board and staff resources and available donor-designated funds.

Rationale: As discovered during the fact base process, Board focus and interest has been primarily in the Equitable Health Outcomes and Health Policy areas. While all Board members expressed an opinion related to Health of the Jewish Community, only a few mentioned Academic Medicine and Bioscience. The work has been directly managed by the Foundation's President since the Foundation's inception (with input from Case Western Reserve University, the Foundation's principal grantee in this area), with much less Board engagement and process than other areas. This represents a governance-strengthening opportunity. There may also be an opportunity to build deeper relationships and social fabric across a wider net of current grantees and other important health institutions in the region—with the Foundation's President, Vice President of Strategy, and Board members. Building a long-term vision that accounts for the Foundation's hospital legacy as an academic medical center and donor designations and leverages current opportunities (while also recognizing that the work in this area need not align the Foundation's equitable health outcomes agenda) offers an opportunity for deeper Board engagement and more significant impact.

GOAL 4: Better align Board and staff resources and expertise and better leverage the Foundation's identified strengths to increase the Foundation's impact in the four key focus areas.

Rationale: Grantmaking in the Equitable Health Outcomes and Health Policy areas are the most labor intensive for staff, and, as mentioned earlier, receives the most significant engagement of the Board. External stakeholders, while citing the Foundation's significant contributions through its grantmaking, see an increased role for the Foundation that leverages its "superpowers" in convening, partnering and policy/advocacy, where investments can drive a more significant, long-term impact. Additionally, as stated earlier, Board attention in other key areas and strategic priorities for the Foundation could substantially build the Foundation's strength. All of these dynamics build a compelling case for re-evaluating where and how precious human and financial resources are deployed. Additionally, Board and staff alike are extremely sensitive to grantmaker-grantseeker dynamics. Feedback suggests that there are opportunities to amend site visit practices to better manage those real and perceived power dynamics.

Goal 5: Strengthen the Foundation's financial and human resources and processes to build capacity that will extend beyond current Board and staff leadership.

Rationale: Ensuring the Foundation's continued strong impact beyond the current leadership requires attention to four areas: Leadership succession, staff retention and development, Board process and financial resources.



Board Chair Judge Dan A. Polster with Mitchell Balk at the 2019 annual meeting



Naaleh Counseling Solutions



Mt. Sinai Physician Leaders
Avrum I. Froimson, MD,
Jeffrey L. Ponsky, MD

• **STAFF RETENTION AND DEVELOPMENT:**

While external stakeholders think very highly of the program staff, they also acknowledge that general turnover poses a threat to the Foundation's long-term impact. And as accomplished and well-respected as they are, externally facing staff are relatively early in their careers and newer to the Foundation. Further compounding potential turnover is the fact that the Foundation staff is small and there is little opportunity for advancement, which is critical to attraction and retention of talent.

• **BOARD PROCESS:** Although the Board is readily acknowledged as one of the region's very best (in fact many Board members serve as Board leaders in organizations across the region), there is a need to codify board processes that happen now on autopilot given the Board's tenure, experience, and long-term familiarity with the President. Building a strong organizational succession path is exceedingly important during this planning horizon.

• **FINANCIAL RESOURCES:** Beyond human resources and process, there is also a desire on the part of the Board to ensure the Foundation's buying power into the future by exploring various options to increase flexibility of investments and explore other options for increasing available resources. A significant portion of Mt. Sinai's asset base is designated for teaching and research medicine. Either identifying more fundable projects within Academic Medicine and Bioscience or figuring out how to use those assets more flexibly across areas is critical.

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** of blessed memory*



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