

OVERLOOK FOUNDATION



Executive Director's Report March 31, 2023



Impact Summary – CY 2022

- Celebrated the grand opening of the Hersh Children’s Center in January
 - 13,950+ pediatric ED patient encounters in 2022
 - 768 admissions in 2022
 - Construction funded by a \$2MM gift from a new donor in 2019
- Kicked off the public phase of our \$176MM Overlook Ahead comprehensive campaign in May
 - Achieved 73% of overall fundraising goal
 - Includes 16 leadership gifts of \$1MM+
- Received strong community support for the expansion of the Frank and Mimi Walsh Maternity Center including a \$1MM gift from The Healthcare Foundation of New Jersey (HFNJ)
- The Reeves Foundation initiated three 3:1 challenges to support the expansion of surgical services
 - \$3.8MM+ raised in 2022 for both same day and main OR surgical services through these challenges
- Established The Stacy Goldstein Breast Center at Overlook
 - Received \$1MM from Ed and Suzann Goldstein to name and optimize the center
- Provided Overlook with \$15.87MM in key capital and programmatic funding support, including
 - \$11MM for capital expenses related to the Master Plan
 - \$1.08MM in clinical educational support to OMC team members
 - \$1MM for hiring and onboarding of hire learners
 - \$76,200 for nursing scholarships
- Partnered with Stephanie Schwartz to design and implement Overlook’s new Arts & Culture series
 - Four programs throughout the year to celebrate our diversity and to enhance team member and community engagement

2023 CY Foundation Goals

Goal	Action Steps	Threshold	Target	Max
1. Fundraise to support the public phase of the Overlook Ahead (OA) campaign	<ul style="list-style-type: none"> Secure major pledges / gifts, including leadership-level gift(s) to support the campaign's capital/infrastructure improvements Reimburse AHS for renovations to SDS and maternity center 	<ul style="list-style-type: none"> FY gross revenue \$9MM Campaign total \$59MM Reimburse AHS \$6MM for expenses related to the Master Plan 	<ul style="list-style-type: none"> FY gross revenue \$10MM Campaign total \$61MM Reimburse AHS \$10MM for expenses related to the Master Plan 	<ul style="list-style-type: none"> FY gross revenue \$11MM Campaign total \$63MM Reimburse AHS \$14MM for expenses related to the Master Plan
2. Increase physician participation in OA campaign fundraising	<ul style="list-style-type: none"> Solicit next wave of physician leaders and group practices to participate in the campaign with Dr. John Audett, Chief Medical Officer Invite select physicians to attend major donor solicitations 	Have one major physician engagement event that focuses on raising awareness and gathering support for the OA campaign	<ul style="list-style-type: none"> Solicit 10 physicians to support the campaign Receive support for the campaign from 5 physicians 	Receive support for the campaign from 7 physicians
3. Enhance strategic engagement of the community to promote Overlook, the OA Campaign, and our mission to enhance the health and health equities of our community	<ul style="list-style-type: none"> Expand relationships with community foundations Evolve our strategies to maintain and grow donor engagement for the duration of the campaign, including employees Create a series of new and intimate donor engagement events focused on Overlook's indispensability within the community 	Hold three community engagement events (ex. Young Professional's Council, a community foundation education event, a Presidential Tour)	<ul style="list-style-type: none"> Install the OA Campaign wall outside of Bouras Auditorium to educate the community on the scope of the campaign, the timeline for construction, dollars raised to date and what has been completed Create a new day-long OMC team member event (Campaign Carnival) to celebrate the campaign 	Secure one major multi-year campaign gift from an institutional donor
4. Continue to meaningfully engage and develop our foundation team members	<ul style="list-style-type: none"> Embody the motto "teamwork makes the dream work" Create and review our Start, Stop, Continue roadmap quarterly and adjust accordingly Create new social activities for team building Focus on training and development of each team member Create pathways for ongoing growth and leadership 	Encourage all team members the opportunity to attend a conference (ex. AHP, BBcon, AFP)	<ul style="list-style-type: none"> Maintain Team Index 1 on PG engagement survey Establish succession planning process for all key roles 	Create new project ownership/leadership opportunities for team members with appropriate support and guidance (ex. Distinguished Donor program, Campaign Carnival, Heritage Society)

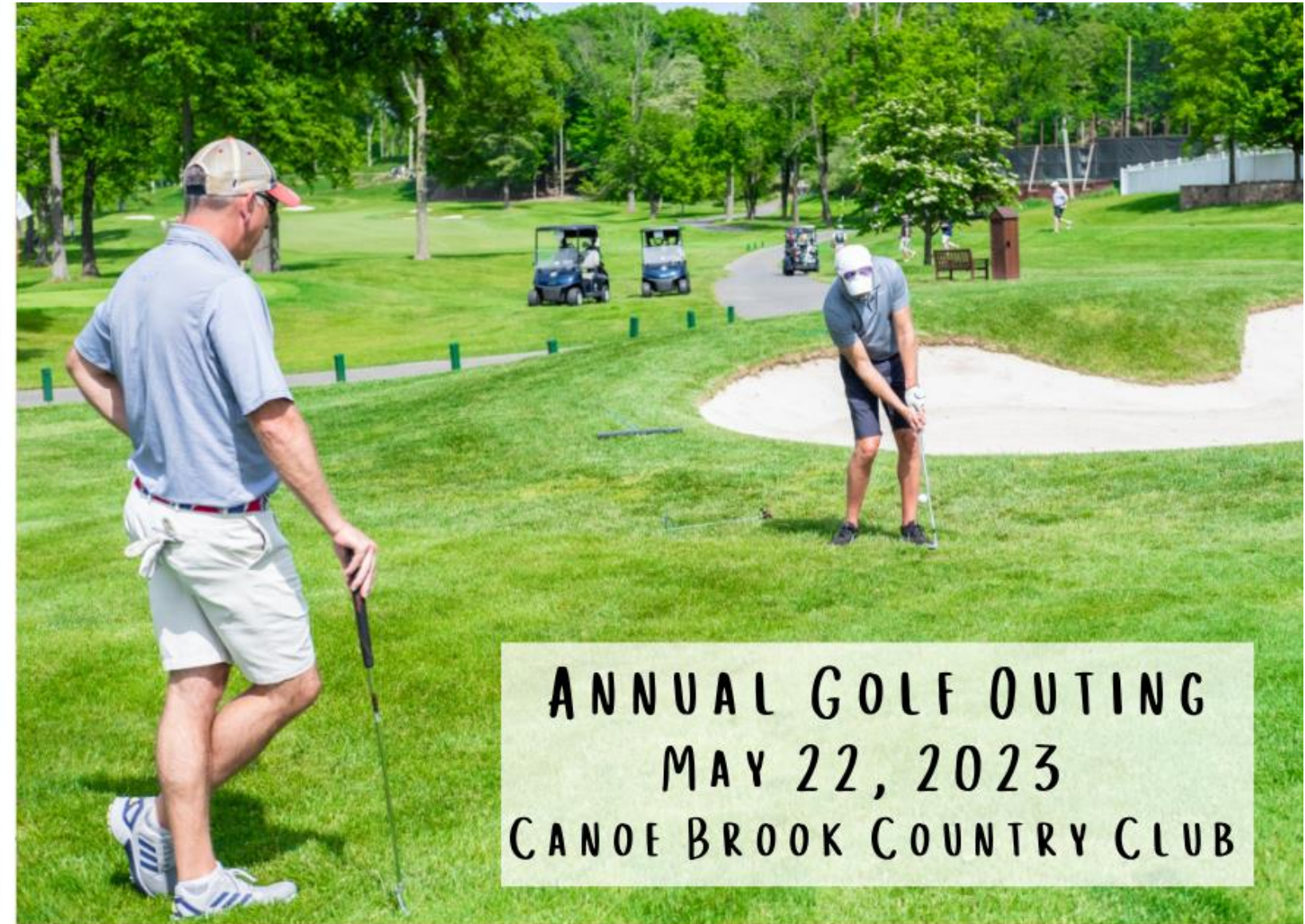
2023 CY Foundation Goals, cont.

Goal	Action Steps	Threshold	Target	• Max
5. Strengthen alignment and coordination between the AHS-aligned foundations	<ul style="list-style-type: none"> Finalize annual CDO status report for all foundations to highlight FY fundraising revenue and the impact philanthropy has both system-wide and locally at each medical center Evaluate DonorSearch and explore implications of transition to a new wealth screening tool to enhance strategic fundraising efforts Evaluate strategies to enhance fundraising efforts to support health equity initiatives 	<ul style="list-style-type: none"> Complete CDO report template and review completed draft in Q1 2023 Overlook Foundation is granted permission to pilot the project by ISS Participate in Dr. Mathew's AHS health equity focused discussions with hospital leadership 	<ul style="list-style-type: none"> Present CDO report to Nikki and optimize further for her presentation to the AHS board of trustees Overlook Foundation receives approval by AHS ISS governance to execute a contract with DonorSearch for daily screenings, bulk screenings and pipeline development, and usage of the tool is implemented Quantify health equity projects that are being funded in 2023 and/or plan to be funded by philanthropy in the future 	<ul style="list-style-type: none"> Overlook Foundation shares initial findings and implications of utilizing DonorSearch for strategic fundraising across all revenue streams including events, annual appeals, major gifts and planned gifts Partner with AHS leadership to explore/define the role philanthropy will have in system-wide health equity initiatives

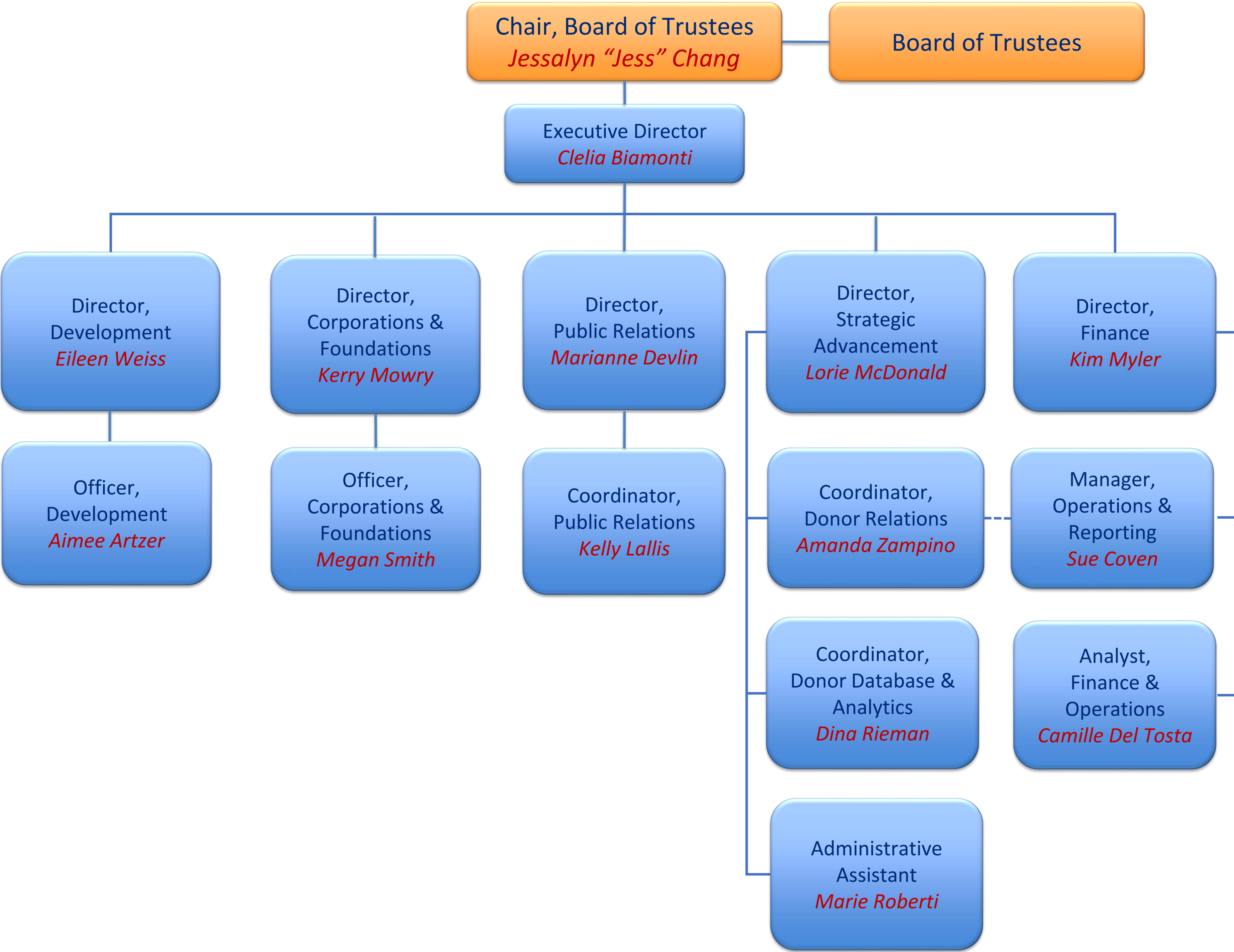
SAVE
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OVERLOOK
FOUNDATION

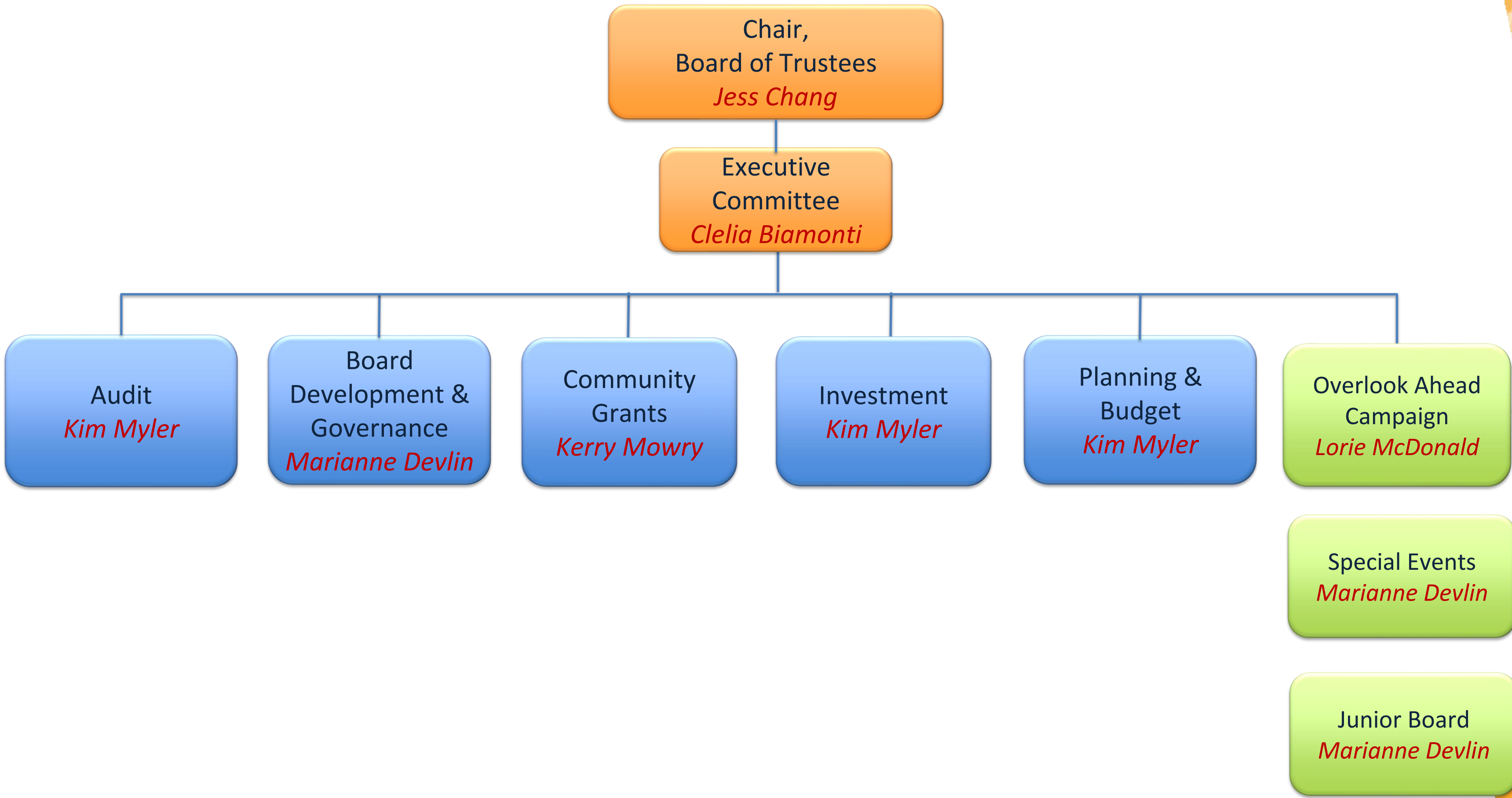
FOR MORE
INFORMATION
REGARDING EVENTS,
PLEASE CALL
908.522.2840



Organizational Structure



Board Committees & Foundation Support Structure



Orange = Foundation leadership
Blue = Standing committees as per bylaws
Green = Fundraising committees

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