



Ball Brothers Foundation

2017 Annual Report



Jud Fisher, *president and chief operating officer*, and **James Fisher**, *chairman and chief executive officer*, are photographed in front of the Edmund F. Ball Medical Education Building.

“Medicine has changed a lot in the past 100 years, but medical training has not. Until now.”


—JULIE ROVNER, Kaiser Health News

FRIENDS,

IN THIS YEAR'S ANNUAL REPORT we focus on a cluster of grants that emerged after two and a half years of conversations with community colleagues who share an ambitious goal: to push traditional boundaries and experiment with new models of healthcare education and delivery. The project that we call “Optimus Primary” is in its earliest stages and, like any learning initiative, will likely undergo refinements as it unfolds. Our initial partners—IU Health Ball Memorial Hospital, the IU School of Medicine-Muncie, Meridian Health Services, and Ball State University—are providing the leadership. BBF's role is to serve as a catalyst by making strategic grants that help move ideas to implementation.

In many ways Optimus Primary continues the Ball family tradition of advocating for progressive approaches to health and education. A gift from the Edmund B. Ball estate provided funds to break ground for Ball Memorial Hospital in 1927, and BMH opened its doors two years later with support from the newly established Ball Brothers Foundation. Today the Edmund F. Ball Medical Education Building is home to students attending the IU School of Medicine-Muncie, and we're part of a team reviewing plans to enlarge the facility to better serve its growing enrollment.

To keep pace with our expanding portfolio of projects we've increased our programming staff by appointing Donna Munchel to the dual position of program officer & grants manager. We also recently added a new member to our team, Michelle Stephenson. Michelle serves as executive assistant & communications coordinator.




James A. Fisher, chairman & chief executive officer

Among other highlights of 2017:

- We topped last year's record-setting grants payout by awarding \$7.3 million to nonprofit organizations in Muncie, Delaware County, and East Central Indiana.
- We stepped up our efforts as a community convener by hosting a downtown visioning summit; inviting Indiana's governor to a gathering of healthcare professionals; engaging workforce development professionals and postsecondary education leaders in a listening session with Indiana's newly appointed secretary of career connections and talent; and organizing a bus tour with BBF's board of directors to acquaint BSU's new president with BBF-funded projects in Delaware County.
- We presented the BBF Excellence in Teaching Award to Chris Holdren, a fifth-grade educator at Selma Elementary School; and we honored John Craddock with the John & Janice Fisher Governance Award for his service to Community Enhancement Projects, Inc.
- We continued a three-year orientation program for Ball family members from across the U.S. who are interested in learning about foundation governance and the Muncie community.

In all our efforts, we've encouraged our grant recipients and community partners to push the boundaries and explore creative concepts with the understanding that taking risks sometimes means risking failure. This spirit of anticipation and discovery was established by our founders and continues to guide our work 90 years later.



Jud Fisher, president and chief operating officer

Reimagining Healthcare

The timing seemed right, “and then it got better and better,” says Dr. Derron Bishop, director of Indiana University’s School of Medicine-Muncie. For several years Bishop had been part of a group of community leaders that met first informally and then intentionally to discuss creative new approaches to healthcare education and delivery.

Members of the group represented four key organizations—the IU School of Medicine-Muncie, IU Health Ball Memorial Hospital, Meridian Health Services, and Ball State University—all located within steps of each other. The geography made Muncie an ideal setting to test the innovative ideas under discussion. Of the nine campuses within the IU School of Medicine’s statewide system, only Muncie offered such close proximity of potential healthcare partners. “The pieces were already here,” says Bishop. “We just needed to assemble them in a new way.”

Three announcements created the momentum to move the pilot projects forward. First, the IU School of Medicine expanded its Muncie physician-training program from two years to four, enabling students to complete their entire medical school education on the local campus. Second, Ball State University unveiled plans to establish a comprehensive College of Health to be housed in a state-of-the-art facility. Finally, Ball Brothers Foundation announced the availability of grants to support the most promising of the collaborative programs. The initiative known as “Optimus Primary” was rolled out in 2017; and “it was a real community effort,” says Bishop.



Ball State University

IU Health Ball Memorial Hospital

IU School of Medicine-Muncie

Meridian Health Services

*IU School of Medicine-Muncie
possible facility expansion*





Faculty and students provide community members with guidance in areas including nutrition, counseling, and speech and hearing, among other services.

Healthy Lifestyle Centers

Common to all the BBF-funded projects launched this year is an emphasis on inter-professional teams of experts who work to assess and address the health needs of patients. As an example, a \$100,000 BBF grant helped create the first of what is likely to become a network of Healthy Lifestyle Centers (HLC). Located in clinical space provided by Meridian Health Services, the first HLC is staffed by faculty and students from the BSU College of Health and the IU School of Medicine-Muncie. Taking a collaborative approach to promoting health and well-being, team members offer guidance—free of charge—on such topics as nutrition, exercise, counseling, speech and hearing, health science, nursing, and social work.

“We’re not here to duplicate services that already exist in the community,” explains Dr. Lenny Kaminsky, director of BSU’s Fisher Institute of Health and Well-Being and an overseer of the HLC. “And we’re certainly not a substitute for the emergency room when there is an acute medical issue.” Instead, the inter-professional team educates patients on the impact of lifestyle decisions and helps them design plans to achieve their health and well-being goals. This may involve creating a physical fitness regimen, learning to discern wise dietary choices, or identifying ways to overcome mental health challenges.

“We want to help people get on the right track,” says Kaminsky, who cites research that underscores the critical need for change. As the new HLC website (www.hlcmuncie.com) reports, Delaware County ranks among the top 10 Hoosier counties in providing excellent medical care for patients struggling with illnesses. “But when it comes to preventing those same illnesses, we’re in the bottom tier of Indiana’s 92 counties,” says Kaminsky. “The mission of the HLC is to change that.”



Prevention vs. intervention

Among the important members of the inter-professional teams are behavioral healthcare specialists. A \$150,000 BBF grant to the IU Health Ball Memorial Hospital Foundation has enabled the hospital to add two behavioral healthcare positions that will be filled in the summer of 2018. A post-doctoral behavioral health fellow will work alongside physicians who are doing their residency training in internal or family medicine at the hospital. The second new staff member, a licensed psychologist, will have teaching responsibilities and will interact with students at the BSU College of Health as well as the doctors in the hospital's residency programs.

"The focus of behavioral healthcare is on prevention and identifying psychological barriers that prevent patients from being engaged in their own care," says Dr. Linda Daniel, clinical director of inpatient behavioral health at the hospital. Different from psychiatry, which often focuses on medication to control symptoms, behavioral healthcare works to modify and change negative health behaviors. In other words, the goal is to "help patients take better care of themselves," Daniel says.

She credits the BBF grant with making it possible to break new ground in training future internal medicine physicians. Whereas the study of behavioral healthcare has long had a place in family medicine curriculum, it has not been a required component of internal medicine training. "The grant has allowed us to think about where we want to go with this," says Daniel. "It's given us a vision for the future." Next step: She anticipates designing an immersive learning class that will involve a range of healthcare professionals and will promote the understanding and development of behavioral healthcare skills.

"A lot of times a physician will tell a patient, 'You need to eat better,' and will recommend a dietician. Or, 'You need to exercise,' and will suggest an exercise physiologist," says Dr. Derron Bishop. "But team members may not fully understand and appreciate what each member

is doing. It's like having a tool box and knowing the name of each tool, but never seeing the tool in action. If physicians train alongside other healthcare team members, they can watch the interaction that takes place and become aware of each person's role." The result: "The physicians become part of a cohesive and efficient team."

Hands-on learning

Two smaller BBF-funded projects, both optional, encourage future physicians to master tools that have the potential to enhance their personal lives and professional careers. Dr. Matthew Harber, director of the BSU Clinical Exercise Physiology Laboratory, has designed a program that invites first and second year medical students to undergo comprehensive health and fitness assessments. Based on the results, Harber and his staff create exercise programs aimed to improve the health of the individuals. As encouragement to take the findings seriously, the students are given access to the university's Adult Physical Fitness Center and the opportunity to monitor success with follow-up testing.

"Our motivation is threefold," says Harber. "We want these future physicians to gain an appreciation of the tests that we do; we want them to learn to improve their personal health and manage the stress that often comes with medical school; and we hope they will take the information that we give them and apply it in their future medical practices. The American Heart Association issued a statement last year saying that cardiorespiratory fitness should be a clinical vital sign and used routinely in clinical practice. The primary barrier is that clinicians don't always understand it because they've never done it."

Like Harber's program, a second initiative—this one dubbed LEO 101, short for Law Enforcement Operations—unfolds outside a traditional medical setting and has a goal of developing a highly specialized set of skills. Medical students are partnered with local law enforcement officers and put in simulated high-stress predicaments



Offsite opportunities range from comprehensive health assessments to simulated law-enforcement training.





BSU students manage the Maplewood Mansion Learning Lab, home to future doctors on rotation in Muncie.



The third floor study lounge.

such as traffic stops or hostage incidents. “Because none of our students have had any experience in situations like these, they bond as a team of equals,” says Derron Bishop. “They learn to make decisions under duress, read each other’s body language, reduce tension, and talk down conflict.” Feedback from participants has been so positive that future teams will likely expand to include a pharmacist, social worker, doctor, and nurse.

Repurposing Maplewood Mansion

A different kind of educational opportunity has resulted from a collaboration between the IU School of Medicine-Muncie, the Department of Management in the Miller College of Business at BSU, and BBF. The partnership repurposes a unique property owned by the Foundation, solves a housing problem for medical students doing brief rotations in Muncie, and creates an immersive learning experience for a group of BSU upperclassmen majoring in residential property management and hospitality and food management.

“It’s like the stars aligned,” says Dr. Carla Earhart, describing the win-win-win project that has five of her BSU students managing Maplewood Mansion on Minnetrista Boulevard. Renamed the “Maplewood Mansion Learning Lab,” the stately residence that was built by William and Emma Ball in 1897 now serves as home to medical students from other IU campuses spending four-to-six weeks training with physicians in the Muncie community. In addition to preparing the rooms for each batch of new occupants, the BSU students have created a policy handbook for the property, assembled a “welcome-to-Muncie” packet of information, and designed plans to renovate the mansion’s third floor as a study lounge for the medical students.

“All of the Ball State students have recently completed internships in residential property management,” says Earhart. “Being at Maplewood enables them to work together and apply what they’ve learned in the classroom and in their internships. It’s truly an immersive experience.”

Works in progress

All of the BBF-funded pilot projects are works in progress and are at different stages of development. Occasionally representatives of the lead organizations get together to offer updates on their activities. The hope is that as successful programs emerge, they will be shared with the larger healthcare community throughout the state and beyond.

“We’re looking at how East Central Indiana can become a medical training ground for the future of healthcare,” says Amelia Clark, former regional vice president at Meridian Health Services. The \$100,000 BBF grant that Meridian received is supporting a feasibility study to consider the establishment of an integrated health education center. A training coordinator has joined the Meridian staff, and a team of Meridian employees has traveled to a Knoxville, Tenn., facility, “to do reconnaissance to see how such a center works and how it might work here.” If the research confirms that an integrated health education center is sustainable in Muncie, it will require time and planning to bring it to fruition. Among the questions to be answered: What kinds of training would the center offer? How would the center’s services be marketed? Who would sign up for the training? How might the center deliver integrated healthcare in new and innovative ways?

“The United States has a healthcare problem—we need to get people connected to the care they need, and providers who are able to meet those needs,” summarizes Clark. “What is great about Optimus Primary is that the partners recognize that the system has to change. We have a lot of wonderful resources in the area, and we’re figuring out how best we can work together to capitalize on them and change the healthcare system.”

Mission

The Ball Brothers Foundation is dedicated to the stewardship legacy of the Ball brothers and to the pursuit of improving the quality of life in Muncie, Delaware County, East Central Indiana, and Indiana, through philanthropy and leadership.

Grant Focus Areas

- Arts and Culture
- Education
- Environment
- Health
- Human Services
- Public Affairs/Society Benefit

Initiatives

- Early Childhood Education
- Emergency Management
- Outdoor Pursuits
- Quality of Place
- Workforce Development

Board of Directors

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Jenna Wachtmann
program officer

Donna Munchel
program officer & grants manager

Michelle Stephenson
executive assistant & communications coordinator

Statement of financial position

Year Ended December 31, 2017

Assets

Cash	\$ 162,000
Investments	178,436,000
Other Assets	12,000
Total Assets	\$ 178,610,000

Statement of receipts and disbursements

Year Ended December 31, 2017

Receipts

Interest and Dividends	\$ 2,651,031
Net Realized Gains	5,883,864
Other	73,798
Total Receipts	\$ 8,608,693

Disbursements

Grants Paid	\$ 7,369,113
Investment Management	709,269
Administrative and Program Expense	1,044,518
Federal Excise Tax	125,000
Total Disbursements	\$ 9,247,900

Excess of Disbursements Over Receipts **\$ (639,207)**

Grants paid in 2017

A Better Way Services.....	\$ 2,500	Kidz Korner Child Care Center.....	5,000
Alliance for Strategic Growth.....	2,500	Liberty Perry Community Schools	15,000
American Red Cross	10,000	Masterworks Chorale	3,795
Back to School Teacher's Store, Inc.....	4,405	Meridian Health Services	75,000
Ball State University	974,131	Minnetrista	2,620,000
Benjamin Harrison Presidential Site	2,500	Monroe Township (Cowan) VFD.....	2,500
Big Brothers Big Sisters of Delaware County.....	22,656	Motivate Our Minds, Inc.....	40,000
Boy Scouts of America	15,000	Muncie Action Plan.....	10,150
Boys & Girls Club of Muncie	125,000	Muncie Arts & Culture Council	10,000
Cardinal Greenway, Inc.....	402,800	Muncie Civic Theatre	64,000
Chesterfield-Union Township Fire Department ..	1,200	Muncie Community Schools.....	308,850
College Mentors for Kids.....	5,000	Muncie Downtown Development Partnership ...	5,000
Community Enhancement Projects, Inc.....	15,000	Muncie Housing Authority.....	3,634
Cornerstone Center for the Arts	104,790	Muncie Innovation Connector, Inc.....	32,500
Cowan Community Schools	7,230	Muncie Sports Commission, Inc.....	5,000
Delaware Advancement Corporation	105,000	Muncie Symphony Orchestra.....	40,000
Delaware County BY5 Early Childhood Initiative ..	50,000	Music for All	25,000
Delaware County CASA.....	1,200	Project Leadership	200,000
Delaware County Sheriff's Office	2,500	Purdue Research Foundation (Polytechnic Institute).	100,000
Delaware County Soil & Water Conservation District.	5,000	Red-tail Land Conservancy, Inc.....	5,000
ECI Regional Partnership.....	115,000	Ross Community Center	120,000
ecoREHAB.....	90,000	Roy C. Buley Community Center.....	200,000
Grant County Soil & Water Conservation District ..	5,000	Second Harvest Food Bank of ECI.....	50,000
Greater Muncie, IN Habitat for Humanity.....	210,000	Shafer Leadership Academy	30,000
Hoosiers Feeding the Hungry.....	2,500	Special Olympics of Indiana	5,000
Huffer Memorial Children's Center, Inc.....	6,821	Sustainable Muncie Corporation	100,000
Independent Colleges of Indiana	75,000	TeenWorks	30,000
Indiana Humanities	1,000	Transition Resources Corporation.....	50,000
Indiana Philanthropy Alliance.....	15,670	United Day Care Center	17,500
Indiana State Museum Foundation.....	75,000	United Way of Delaware County	75,000
Indiana Youth Institute	60,000	Wayne County Soil & Water Conservation District ..	5,000
Inside Out, CDC	51,675	Women in Business Unlimited	2,500
IU Health Ball Memorial Hospital Foundation....	150,000	YMCA of Muncie/Camp Crosley	135,000
IU School of Medicine Muncie	150,000	Youth Opportunity Center, Inc.....	102,500
Jay County Robotics	2,600	YWCA of Muncie.....	3,183
Jay Randolph Developmental Services, Inc.....	4,323	Total Grant Payments for 2017.....	\$ 7,369,113

PUSHING THE BOUNDARIES



Ball Brothers Foundation's board includes third and fourth generation family members as well as non-family community members. This photo was taken after a recent board meeting and includes BBF staff, board members, and associate directors. It was taken at one of the Ross Center's new fields.



Ball Brothers Foundation



**THE LEGACY
CONTINUES**

1926 - TODAY

222 S. Mulberry Street, Muncie, IN 47305

Mailing: P.O. Box 1408, Muncie, IN 47308

(765) 741-5500 • Fax: (765) 741-5518

www.ballfdn.org