

2016 Impact Report



The Foundation
of the Pennsylvania Medical Society

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2016 BOARD OF TRUSTEES



Our board led the Foundation through the 30 Years of Change Endowment Campaign showcasing the depth and breadth of our PHP. We offer stability in the form of student loans and scholarships. LifeGuard offers stability in its programs and services. Educational offerings are solid. The board has combined service of almost nine decades! Pictured are: (left to right front row) Ravi Dukkipati, MD; Paul F. Dende, DO; Virginia E. Hall, MD; Raymond C. Truex Jr., MD; and William J. West Jr., MD; (back row) William R. Dewar III, MD; Kirk Tolhurst, MD; and Erick J. Bergquist, MD, PhD. Not pictured: Joanne R. Bergquist, Kenneth M. Certa, MD; Michael Fraser, PhD, CAE, FCPP; and Peter S. Lund, MD.

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OUR MISSION

The Foundation of the Pennsylvania Medical Society provides programs and services for individual physicians and others that improve the well-being of Pennsylvanians and sustain the future of medicine.

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Raymond Truex Jr., MD, FAANS, FACS, chaired the Foundation of the Pennsylvania Medical Society Board of Trustees for more than a decade. At the end of 2016, he retired and passed the gavel to Virginia Ettinger Hall, MD, FACOG, FACP, who was elected chair. He will remain on the board as immediate past president. The Foundation was honored and privileged to benefit from his leadership.

MEETING OUR MISSION



Raymond C. Truex Jr.,
MD, FAANS, FACS,
Chair

In my final year as board chair, I was also honored to serve as the Physicians' Health Program 30 Years of Change Endowment Campaign Chair. With your support, we reached our goal of raising more than \$62,000 to shore up the PHP Endowment Fund. PHP ensures physicians have the supportive resources and tools to stay healthy so they can continue providing health care for others. We all know how important it is to care for our fellow physicians.

The formal addition of LifeGuard to the Foundation's hallmark service lines was a full circle moment for me. The idea of creating a program to assess a physician's clinical competency was difficult to grasp at first. These are my medical colleagues who are affected. However, watching the program evolve and knowing the quality of programming and faculty, I am proud that this program is one of my legacies. LifeGuard was conceptualized by physicians for physicians. It protects patients and maintains its singular purpose – to fairly assess the physician.

Looking ahead we will honor the Student Financial Services program by sharing stories of past scholarship winners and seeing where they are in their medical careers. These bright students are the future of medical care and I am always inspired by their energy and commitment. These scholarship and loan recipients restore my faith that our noble profession is in good hands in the future.

It was an honor to serve as board chair and to lead such an amazing organization that truly cares about physicians and the struggles they face. These programs epitomize that change is good and necessary. As my role changes, I look forward to remaining a part of the vibrant Foundation.

THANKING OUR LEADERS

We welcome our new Board of Trustees Chair Virginia Ettinger Hall, MD, FACOG, FACP, and look forward to her inspired leadership. We express infinite gratitude to Raymond Truex Jr., MD, FAANS, FACS, for steadfastly leading our board.

Dr. Truex is one of the most authentic individuals I have ever encountered. Each day during his leadership, the singular focus was to improve the human condition of a physician. He was brutally aware of the significance of our work and how lives hang in the balance. He humbly and generously reached out to many individuals to say, "Life in sobriety is possible. The Foundation can help. Let me guide you on your way to a life of wellness with help from the PHP."

His heartshare was boundless as he personally picked up the phone to speak with a loan recipient family to tell them that we had forgiven the debt after an unexpected illness tragically took a young physician's life. He participated in LifeGuard's ground-breaking late-career physician symposium to truly understand the importance of a fair and unbiased assessment. He not only talked the talk, he walked the walk. His generosity of time, talent and treasure was ceaseless and the Foundation is better because of his vision, relentless passion and influence.

I'm proud of the work we have done this year and even more gratified of having the chance to lead with our Board of Trustees who all dedicate themselves tirelessly to the mission of the Foundation.



Heather A. Wilson,
MSW, CFRE,
Executive Director,
The Foundation of
the Pennsylvania
Medical Society,
Deputy Executive
Vice President,
Pennsylvania Medical
Society



Virginia Ettinger Hall,
MD, FACOG, FACP,
Chair

WELCOMING NEW CHALLENGES

Virginia Ettinger Hall, MD, FACOG, FACP, was elected chair of the Foundation Board of Trustees. She began her leadership of the board in January 2017. "I am accepting this huge responsibility in light of all of the societal changes and needs that the Foundation serves. I want to focus on the core of the PHP. I look forward to broadening the scope of LifeGuard and Student Financial Services, as I am intimately involved in academics in my career," Dr. Hall says. She practices Obstetrics & Gynecology for Penn State Health at the Milton S. Hershey Medical Center. She has served on the Foundation board since 2001, most recently as treasurer. The eldest of eight children, Dr. Hall was a Foundation loan and scholarship recipient, which helped her to finance her medical degree. She says she has witnessed a 40-fold increase in tuition and views Foundation programs as an imperative to ensuring access to medical school education.

CELEBRATING THE PEOPLE BEHIND PHP

This year, the PHP has spent a lot of time reflecting over the history of the program. Our campaign celebrating the 30th anniversary milestone was so meaningful to those involved with the PHP, both present and past. We heard from participants, staff, family members, friends and various others who help support our participants and the mission of the PHP. We thank the PHP Advisory Committee for their leadership in moving the PHP



forward. Three times a year, PHP staff members meet with this committee to discuss program operations. The committee consists of volunteers who care deeply about the PHP and those who are participating in the program. In 2016, the committee worked to update policies and procedures, discussed challenges with peer monitoring and reviewed difficult cases that the PHP faced.

THE PHYSICIANS' HEALTH PROGRAM (PHP) provides monitoring services to Pennsylvania physicians, physician assistants, dentists and other eligible licensed professionals and trainees who are experiencing challenges related to substance use disorders, mental health or other behavioral concerns. The services of the PHP are confidential. PHP monitoring allows for the collection of documentation to make sure that participants are healthy and can safely practice their chosen professions.

The PHP staff is committed to professional development and several staff members worked to achieve additional certifications, maintain certifications and finish educational programs. Katie Gruber graduated from Temple University with a Masters in Social Work in August 2016.

Kendra Parry and Tiffany Booher both earned Certified Case Manager designation through the Pennsylvania Certification Board in March 2016. Barbara Dillow maintained her Certified Medical Office Assistant credential.

Foundation Trustee Paul Dende, DO, receives a standing ovation at the 2016 PAMED House of Delegates for courageously sharing his story of recovery in honor of the 30 years celebration. Go to our website under "Videos" to watch the footage. >



PHP Medical Director Jon Shapiro, MD, presents about addiction and burnout. In 2016, PHP staff provided ten presentations and exhibited at two conferences to share information about the program. <



2016 STATISTICS

Number of participants that completed a monitoring agreement: **43**

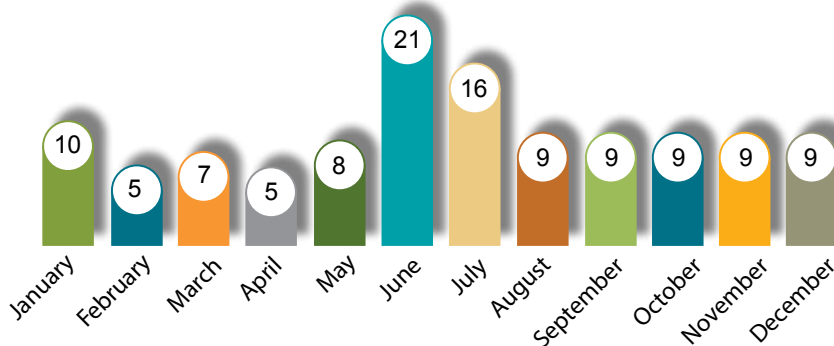
The PHP signed a total of **117** agreements in 2016. (see chart below)

Total number of referrals: **272** cases Percentage of referrals by source (see chart at right)

Total number of active cases being monitored: **472** (at the end of 2016)



2016 AGREEMENT SIGNINGS





LIFEGUARD®
COMPLETE CLINICAL CONFIDENCE.

**OPIOIDS
FOR
PAIN**

- Be smart.
- Be safe.
- Be sure.**

A Public Health Advocacy Program from the Pennsylvania Medical Society

In 2016, the opioid epidemic was well publicized with significant efforts outlined in attempts to address the potential underlying factors contributing to the issue.

In an effort to help health care providers to be sure of their prescribing practices, LifeGuard introduced the Opioid and Controlled Substance Educational Program.

LifeGuard designed the course to provide advanced education and techniques to assist physicians with management of the chronic pain patient and the complexities associated with treatment that may lead to opioid dependency. The physician not only learns how to spot “red flags” that may point to inappropriate use of opioids as well as a myriad of other methodologies to better manage the patient, but also allows the physician to “practice” learned techniques with the use of standardized patients.



Penn Medicine

Penn Medicine, Division of Critical Care and Anesthesiology and LifeGuard developed the educational program to help physicians identify and address their personal prescribing patterns.

“This educational program is a vital tool to assist physicians who are improving their individual patient approach to the opioid crisis.”

Marcia Lammando, RN, BSN, MHSA
Director, LifeGuard Program

2016 STATISTICS

LifeGuard gained a 14 percent increase in the number of physicians completing the program in 2016 when compared to 2015.

LifeGuard provided services to 33 active participants with 23 completing their programs during the calendar year of 2016.

Types of programs completed by participants

- Career Transition - 1
- Fitness for Duty/Late Career - 4
- Initial Licensure - 3
- Re-Instatement
 - Retired - 2
 - Inactive/Lapse - 2
 - Disciplinary - 5
- Practice Monitoring - 1
- Quality of Care - 5



In 2016, LifeGuard was excited to announce a collaboration with KSTAR of the Texas A&M Rural and Community Health Institute to provide two new CME programs: Medical Record Documentation and Pharmacology and Prescribing available in 2017. See www.lifeguardprogram.com for details.

STUDENT FINANCIAL SERVICES

We recognize the vital role that health care providers play in the lives of all Pennsylvanians. The Foundation offers scholarships and low-interest loans for medical students. We offer personalized customer service to Pennsylvania residents enrolled in fully accredited medical schools.



2016 Alliance Medical Education Scholarship Winners

For the past 14 years, the Alliance has awarded scholarships to medical students. Here, medical students are presented with scholarships at the AMES fundraising event in Hershey. Attending are (left to right) Kathleen Prendergast, Esq., Carol Schmitz, Ahmed Kashkoush, Barbara Prendergast (seated), Christopher Hong, Mona Lotfipour, Graeme Williams, Rachel Polinski, Jamil Alhassan, Alexander Adams, Dorothy Grandon, Charles Cutler, MD, and Arlene Oyler.

2016 HIGHLIGHTS

Awarded 16 scholarships **totaling \$37,500**

- Blair County Medical Society Scholarship selects its first recipient

Since 1948 **more than \$20.1 million in loans and scholarships** has been awarded to 4,536 students

Awarded 86 loans **totaling \$485,400**

- \$52,900 more than in 2015 to an additional 7 students
- Board increased maximum individual annual loan award from \$7,000 to \$10,000 (minimum raised from \$3,000 to \$6,000) with the aggregate total increased to \$30,000 from the previous \$21,000 aggregate total



The Foundation of the Pennsylvania Medical Society

THE FOUNDATION LISTENS

Student Financial Services emailed a survey to 409 active loan borrowers to evaluate satisfaction with the loan product and customer service. We received a 37 percent response rate:

- 99 percent of respondents gave an overall rating for the Foundation loan of good to excellent
- 82 individuals told us what they like about the loan program - top responses:
 - Low interest rates
 - Ease and flexibility of deferments
 - Customer service
 - Application ease
- 98 percent of respondents are satisfied to extremely satisfied with customer service, based on the following attributes:
 - Responsive/timely
 - Helpful/informative
 - Well organized
- Sampling of comments from survey:
 - I appreciate the extra funds and the delayed repayment. It is a great option for funds with a low interest rate!*
 - They have been very flexible with my deferment.*
 - It is extremely easy to apply for and there is great support and communication.*
 - Staff are responsive. The program came through for me when I needed it.*
 - A good source of funding as students must accumulate more funds to get through medical school. The fact that you can defer repayment makes this a stronger loan.*
 - The interest rates during school are lower than most other loans.*
 - Easy access, excellent rates, great repayment options.*

Scholarship Winners



Endowment for South Asian Students of Indian Descent
Anup Bhattacharya

Lycoming County Medical Society
Alexandra Digenakis



Allegheny County Medical Society
Gretchen Evans

Montgomery County Medical Society
Daniel Friedman



Dauphin County Medical Society
Emily Galli

Lehigh County Medical Auxiliary Scholarship and Educational Fund
Ramzy Nagle



Lycoming County Medical Society
Joshua Van Allen

Blair County Medical Society
Adam Weaver



Myrtle Siegfried, MD and Michael Vigilante, MD Scholarship
Lucas Wittman

Find out more about our scholarship recipients, eligibility for county or special interest awards and how to apply at www.foundationpamedsoc.org.

FINANCIAL HIGHLIGHTS

2016 in Numbers*

For the Years Ended December 31, 2016 and 2015

Combined Financial Highlights (Foundation, PAMED Charitable Trust, Medical Legacy Fund)

ASSETS, LIABILITIES & NET ASSETS

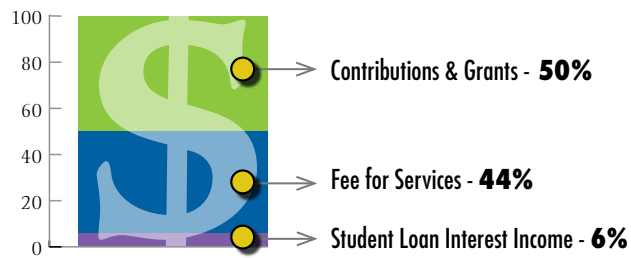
	2016	2015
Assets	\$13,174,196	\$12,542,997
Liabilities	\$ 2,601,549	\$ 2,452,548
Net Assets	\$10,572,647	\$10,090,449

SUMMARY OF REVENUES & EXPENSES

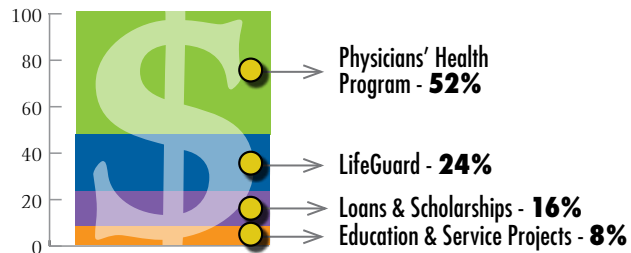
	2016	2015
Contributions and Grants	\$1,125,193	\$ 998,967
Fee for Service	\$ 924,470	\$ 891,274
Student Loan Interest Income	\$ 141,103	\$ 133,816
Investment and Other Revenues	\$ 439,264	(\$ 113,722)
Total Expenses	(\$2,037,480)	(\$1,805,080)
Excess Revenue Over Expenses	\$ 592,550	\$ 148,735

*Unaudited

REVENUE SOURCES



TOTAL PROGRAM SERVICES



ANNUAL OPERATING EXPENSES



Thank you to our Donors

DISTINGUISHED LIFETIME FELLOWS

Ensuring the future through commitment of a legacy gift

The Foundation of the Pennsylvania Medical Society Fellows is an elite group who made provisions to advance the work of the Foundation in the areas of education, wellness and clinical excellence. Utilizing a variety of estate planning tools, such as bequest gifts, charitable gift annuities and trusts, Fellow Society members demonstrate their commitment to the Foundation's mission and ensure a lasting legacy of physician excellence for future generations.

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* Deceased



"On behalf of the medical students and physicians who are recipients of our services, thank you for your generosity in 2016."

— Margie Lamberson,
CFRE, Director of
Philanthropy



Thank you to our Foundation Trustee and Development Chair William R. Dewar III, MD, FACP, for helping us to reach our philanthropic goals this year!

The Physician Legacy Newsletter

The Foundation produced its planned giving newsletter titled *The Physician Legacy*. It includes a special focus on general estate and financial planning issues. Thanks to the commitment of our donors, we are able to make a real difference in the lives of physicians. If you did not receive a copy of this newsletter and would like to be added to our mailing list or would like more information regarding planned giving opportunities, please feel free to contact Margie Lamberson, CFRE, at mlamberson@pamedsoc.org or 717.558.7846.



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your philanthropic gifts
during 2016*

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\$10,000 or more

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\$5,000 to \$9,999

LEADER

\$2,500 to \$4,999

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\$1,000 to \$2,499

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\$500 to \$999

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\$100 to \$499

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up to \$99

*Please see
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for our contributor list.*

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