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.

The Board of Trustees and staff of the Foundation are proud to serve as your philanthropic and programmatic partner, and we are grateful for your generous support.

2019-2020 ACCOMPLISHMENTS

PRIORITY AREA: EDUCATION – STUDENT FINANCIAL SERVICES

Student Loans: figures as of 12/31/2019
- Active Loan Accounts: $4,450,000 for 372 accounts as of 12/31/2019
- Default Rate: 0.0 %  Delinquent Rate: .38%
- Loans: $594,000 to 69 medical students for the 2018-2019 academic year as of 12/31/2019
- Loan Amounts: Individual awards ranged from $6,000-$10,000, maximum aggregate loan amount per student was $31,000
- Disbursement: As of December 2019, the Foundation has disbursed more than $22,066,807 in loans and scholarships to 4,673 medical and allied health students (Appendix A)

Student Loans: figures as of 12/31/2019
- Active Loan Accounts: $4,452,609 for 372 accounts as of 12/31/2019
- Default Rate: 0.0 %  Delinquent Rate: .38%
- Loans: $594,000 to 69 medical students for the 2019-2020 academic year as of 12/31/2019
- Loan Amounts: Individual awards ranged from $6,000-$10,000, maximum aggregate loan amount per student was $30,000
- Disbursement: As of December 2019, the Foundation has disbursed more than $22,066,807 in loans and scholarships to 4,673 medical and allied health students (Appendix A)

Scholarships Awarded
The Foundation manages eleven (11) scholarships. In 2019, nineteen scholarships were awarded to fifteen students totaling $45,264. For information related to scholarship eligibility criteria and application dates, please go to Foundation Scholarships:

ALLEGHENY COUNTY MEDICAL SOCIETY MEDICAL STUDENT SCHOLARSHIP:
Sarah Minney, Allegheny County, University of Pittsburgh School of Medicine – $4,000
ALLIANCE MEDICAL EDUCATION SCHOLARSHIP (AMES): Mathew M. Duda, Montgomery County, Perelman School of Medicine at University of Pennsylvania, Robert & Arlene Oyler Award – $3,000; Amelia M. Mackarey, Lackawanna County, Geisinger Commonwealth School of Medicine, William J. West, Jr., MD Award – $3,000; Benjamin J. Carnahan, Armstrong County, Penn State University College of Medicine, Barbara Prendergast Award – $2,500; Zachary M. Weisner, Jefferson County, Lake Erie College of Osteopathic Medicine, Dauphin County Medical Society Alliance Award – $2,500; Jacob A. Jerome, Allegheny County, University of Pittsburgh School of Medicine, $2,500.

BLAIR COUNTY MEDICAL SOCIETY SCHOLARSHIP: No applications were received in 2019; therefore, no awards were issued.

ENDOWMENT FOR SOUTH ASIAN STUDENTS OF INDIAN DESCENT SCHOLARSHIP: Anjana Sinha, Mercer County, New Jersey, Penn State University College of Medicine – $3,000

LEHIGH COUNTY MEDICAL AUXILIARY’S SCHOLARSHIP AND EDUCATIONAL FUND: David S. Bailey, Lehigh County, Penn State University College of Medicine - $2,500

LYCOMING COUNTY MEDICAL SOCIETY SCHOLARSHIP: Tyler L. Bogaczyk, Lycoming County, Geisinger Commonwealth School of Medicine - $3,000

MONTGOMERY COUNTY MEDICAL SOCIETY WILLIAM W. LANDER, MD, MEDICAL STUDENT SCHOLARSHIP: Sara M. Briker, Montgomery County, Perelman School of Medicine at University of Pennsylvania - $2,000; Andrew Parambath, Montgomery County, Perelman School of Medicine at University of Pennsylvania - $2,000

MYRTLE SIEGFRIED, MD, AND MICHAEL VIGILANTE, MD SCHOLARSHIP: Sarah N. Fortna, Berks County, Jacobs School of Medicine University at Buffalo - $1,000

SCOTT A. GUNDER, MD, DCMS PRESIDENTIAL SCHOLARSHIP: Abby R. London, York County, Penn State University College of Medicine - $1,500

SHAH FAMILY SCHOLARSHIP: Donald K. Detchou, Philadelphia County, Perelman School of Medicine at University of Pennsylvania - $5,000; Navya M. George, Philadelphia County, Sidney Kimmel Medical College at Thomas Jefferson - $5,000

FOUNDATION EDUCATION AWARD: Tyler L. Bogaczyk, Lycoming County, Geisinger Commonwealth School of Medicine - $691; Sarah M. Briker, Montgomery County, Perelman School of Medicine at University of Pennsylvania - $691; Donald K. Detchou, Philadelphia County, Perelman School of Medicine at University of Pennsylvania - $691; Navya M. George, Philadelphia County, Sidney Kimmel Medical College at Thomas Jefferson - $691
**PRIORITY AREA: PHYSICIAN HEALTH & WELLNESS – PHYSICIANS’ HEALTH PROGRAM**

The Physicians’ Health Program (PHP) assists physicians and other eligible health care professionals to understand, accept and cope with the physical, emotional, spiritual and mental conditions which impair or threaten to impair their health and well-being, and thus help them to meet the usual and high standards of medical care required of licensed physicians/others in the Commonwealth of Pennsylvania. The PHP is able to provide those who suffer from addiction, mental health disorders or behavioral concerns that impact their ability to practice medicine, with support and advocacy services needed by compiling documentation that accurately reflects their participation and compliance with their monitoring agreement. Participants in long-term recovery, mentor and support physicians/others in early recovery through sharing their experience, strength and hope.

- **Active Caseload:** 445 participants
- **Referrals:** 274 referrals were received in 2019
  - PHMP referred 71% of the participants in 2019 which is up from 53% in 2018. This is largely due to the activation of JNET for podiatrists and dentists.
  - Dental referrals increased by 43.6%
  - Referrals by license type include: MD - 118; DO – 45; DHY/EFDA – 36; PA – 22; DMD- 18; DDS – 17; Student – 16; DPM - 2
- **Agreements:** 134 agreements were signed for entry into the PHP program in 2019

**Key Activities in 2019:**
- Tiffany M. Booher, MA, LPC, CAADC, CIP, CCSM assumed the role of PHP Program Director
- 18 educational presentations were provided to various hospitals and health systems as well as exhibited at three conferences to spread awareness and information about the PHP
- Several PHP staff members serve on the board and/or committees of the Federation of State Physician Health Programs (FSPHP)
- The results of the annual impact survey were reviewed with the Foundation Board to assess participants’ experience after program completion

**PRIORITY AREA: PHYSICIAN CLINICAL COMPETENCY – LIFEGUARD®**

Lifeguard® provides physicians with an unbiased seamless pathway for re-entry into the workforce and provides remediation for those who may have fallen behind in clinical skills or continuing education, or about whom quality concerns have arisen through a peer review process. Lifeguard utilizes the medical model as its basis and a case management approach to provide components of the program as needed.

- LifeGuard has a dedicated website: [http://www.lifeguardprogram.com/](http://www.lifeguardprogram.com/)
- 204 physicians from 28 states and the District of Columbia have completed LifeGuard since February 2011
- An 85% proposal acceptance rate was recognized, up from 80% in 2018

2019-2020
• 2019: 58 physicians enrolled
  o 23 Pennsylvania physicians – 40% of total
  o 35 out of state physicians – 60% of total
  o 35 physicians completed a program pathway, the program breakdown is as follows:
    ▪ Reentry/Initial Licensure: 6
    ▪ Reinstatement/Disciplinary Action: 5
    ▪ Fitness for Duty/Late Career Assessment: 9
    ▪ Quality of Care: 7
    ▪ Practice Monitoring/Assessment Training Monitoring (ATM) Programs: 5
    ▪ Preceptor Oversight: 2
    ▪ Professional Assessment: 1
  o 12 physicians continued their program into 2020, the program breakdown is as follows:
    ▪ Reinstatement/Disciplinary Action: 3
    ▪ Practice Monitoring/ATM Programs: 9

• Program Enhancements for 2019:
  o Development of SP’s for use in evaluation and assessment of physicians treating OUD patients
  o Enhancement of the ATM by tweaking assessment processes and conducting inter-rater reliability testing
  o Enhancement of the practice monitoring program through the development of additional training and monitoring tools for LifeGuard reviewers to provide consistency during an onsite monitoring/audit assessment processes and conducting inter-rater reliability testing
  o Development of an Infection Control ATM Program including:
    ▪ Assessment focused on ambulatory infection control practices nationally recognized to prevention and control the transmission of infectious diseases
    ▪ Audit tools developed with focus on guidelines developed by CDC, APIC, SHEA and other organizations
    ▪ Audits ongoing to monitor compliance with guidelines

• Since moving to the Foundation in 2016, the LifeGuard program enrollment had grown by 172%

PRIORITY AREA: PHILANTHROPY & COMMUNICATIONS

Philanthropy and communications are the undergirding tools to advance the mission and programs of the Foundation. Why is support for the Foundation important? Simply put, every program at the Foundation exists for the sole benefit of Pennsylvania physicians. We help future physicians obtain their medical education. We encourage the impaired physician to get help when they are suffering with addiction and we provide monitoring to ensure that they are safe and certain when practicing in their medical community. We provide fair assessment and
efficient and effective remediation when clinical skills are called into question. The Foundation offers programs that speak to improving the human condition of the physician regardless of the political and economic influences that impact the practice of medicine.

**Philanthropy**

- **House of Delegates Honor Gift for the Outgoing PAMED President:** You currently have the opportunity to honor Lawrence John, MD, for his service as the PAMED president. To make a lasting impact, Dr. John has generously put up a $10,000 matching gift. [To honor Dr. John, click here](#). The Foundation thanks all the delegates who have contributed to our PAMED President Honor Campaign over the years.

- **Hospital Giving to the PHP** as of 12/31/2019 $272,230 from 141 hospitals has been raised compared to $277,282 from 150 hospitals in 2018. The PHP remains the single most effective program to ensure that an impaired physician is sober, safe and certain.

- **Annual giving for the PHP** as of 12/31/2019 was $361,812 compare to $360,751 as of 12/31/2018

- **Total annual giving as of 12/31/2019 was $1,526,281** compared to $1,608,968 for 12/31/2018.

- **The Foundation’s Fundraising Efficiency ROI:** Is 5.9 for every dollar we invest in fundraising, we receive almost six times that amount. The ratio is calculated by dividing the total unrestricted contributions by the fundraising expenses.

- **Face Ratio:** The Foundation maintained a 25% FACE ratio for 2019. The ratio of fundraising and administration costs to total expenditure (FACE) is frequently used as a benchmark to measure the efficiency of charities. The national standard is 35% or less.

- **990 Program Spending Ratio:** The Foundation programmatic spend is 75% (the IRS program spending threshold is 65% program/35% overall)

**Communications**

The [2019 Impact Report](#) was released. Please review our Impact Report here.

**Financial Information**

Appendix B contains a review of the Foundation’s financial information for 2019. Audited reports are prepared each year by the accounting firm of Kreischer Miller. A copy is available through the Foundation’s office of the Executive Director.

**2020 Board of Trustees**

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Virginia E. Hall, MD, FACOG, FACP, Chair</td>
<td>Daniel B. Kimball, Jr., MD, MACP</td>
</tr>
<tr>
<td>Paul F. Dende, DO, FACP, Assistant Treasurer</td>
<td>Gwendolyn A. Poles, DO, FACP</td>
</tr>
<tr>
<td>William J. West Jr., MD, Treasurer</td>
<td>Martin P. Raniowski, MA, CAE</td>
</tr>
<tr>
<td>Erick J. Bergquist, MD, PhD</td>
<td>Lynda Thomas-Mabine, MD, FACOG</td>
</tr>
<tr>
<td>Joanne R. Bergquist</td>
<td>Anamika Saha – Med. Student Trustee</td>
</tr>
<tr>
<td>Kenneth M. Certa, MD</td>
<td>John Francis Curtis, IV – Med. Student Trustee Elect</td>
</tr>
<tr>
<td>William R. Dewar III, MD, FACP</td>
<td>Heather A. Wilson, MSW, CFRE, CAE, Secretary</td>
</tr>
</tbody>
</table>

2019-2020
### Statistics on active student loans:

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>Amount of Aid</th>
<th>Number of Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active Paying Loans</td>
<td>$1,321,726</td>
<td>170</td>
</tr>
<tr>
<td>Active Non-paying Loans (in-school/residency)</td>
<td>$3,130,884</td>
<td>202</td>
</tr>
<tr>
<td><strong>Total Active Loans</strong></td>
<td><strong>$4,452,609</strong></td>
<td><strong>372</strong></td>
</tr>
</tbody>
</table>

*The average default rate for 2019 was 0%*

### Total student aid awarded since 1948:

<table>
<thead>
<tr>
<th>Loan Type</th>
<th>Amount of Aid</th>
<th>Number of Accounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical Student Loans</td>
<td>$19,404,978</td>
<td>3,352</td>
</tr>
<tr>
<td>Residency Relocation Loans</td>
<td>394,600</td>
<td>*</td>
</tr>
<tr>
<td>(Extension of Medical Student Loan)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allied Health &amp; Miscellaneous Student Loans</td>
<td>948,319</td>
<td>580</td>
</tr>
<tr>
<td>Loans for Children of Deceased or Disabled Physicians</td>
<td>282,417</td>
<td>96</td>
</tr>
<tr>
<td>Scholarships</td>
<td>$1,036,493</td>
<td>645</td>
</tr>
<tr>
<td><strong>Total, Student Aid Since 1948</strong></td>
<td><strong>$22,066,807</strong></td>
<td><strong>4,673</strong></td>
</tr>
</tbody>
</table>

*Number of persons is not given because these borrowers also received medical student loans and are accounted for in the medical student loan total. As a matter of information, 392 of these loans have been awarded since 1991, when the program was initiated.*
APPENDIX B

THE FOUNDATION OF THE PENNSYLVANIA MEDICAL SOCIETY AND AFFILIATES

Combined Statements of Financial Position
December 31, 2019 and 2018

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$ 835,660</td>
<td>$ 1,112,330</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td>120,822</td>
<td>169,754</td>
</tr>
<tr>
<td>Investments (Notes 1 and 3)</td>
<td>9,199,420</td>
<td>7,423,268</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>14,342</td>
<td>4,260</td>
</tr>
<tr>
<td>Loans receivable, net of allowance for uncollectible loans of $18,824 in 2019 and $82,114 in 2018 (Note 4)</td>
<td>4,433,785</td>
<td>4,394,734</td>
</tr>
<tr>
<td>Accrued interest receivable</td>
<td>198,028</td>
<td>170,251</td>
</tr>
<tr>
<td>Office equipment, net of accumulated depreciation of $145,352 in 2019 and $140,977 in 2018 (Note 1)</td>
<td>47,852</td>
<td>25,605</td>
</tr>
<tr>
<td>Split-interest agreements (Note 5):</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assets held in charitable remainder trusts</td>
<td>120,029</td>
<td>102,813</td>
</tr>
<tr>
<td>Beneficial interest in perpetual trust</td>
<td>780,390</td>
<td>675,548</td>
</tr>
<tr>
<td>Contributions receivable from split-interest agreements</td>
<td>121,342</td>
<td>118,904</td>
</tr>
<tr>
<td></td>
<td>$ 15,871,670</td>
<td>$ 14,197,467</td>
</tr>
</tbody>
</table>

LIABILITIES AND NET ASSETS

| Accounts payable                                                     | $ 93,512  | $ 77,724  |
| Accrued expenses                                                     | 54,970    | 54,489    |
| Deferred revenue                                                     | 66,385    | 85,520    |
| Agency funds                                                         | 211,183   | 190,496   |
| Liability under split-interest agreements (Note 5)                  | 173,436   | 180,420   |
| Pension liability (Note 10)                                          | 1,603,701 | 1,751,958 |
|                                                                     | 2,203,187 | 2,340,607 |

Net assets:

Without donor restrictions:

  Board designated                                                     | 3,760,765 | 3,202,768 |
  Undesignated                                                         | 5,549,202 | 4,894,073 |
  With donor restrictions                                              | 4,358,516 | 3,760,019 |

  13,668,483                                                          | 11,856,860 |

  $ 15,871,670                                                         | $ 14,197,467 |

See accompanying notes to combined financial statements.