

EXPANSION OF RESOURCES
TARGETED OUTCOMES

Increased Access
Best Practices

Competitive Loans
DEDICATION TO GIVING

TRUSTEES
National Voice

RAISING THE BAR

for Program Excellence

Elevated Education
LEGACY GIFTING

Training

Standards for Excellence
Best & Brightest

Thriving
Physicians

COMMITTED PHILANTHROPY

RESEARCH

2017 IMPACT REPORT



The Foundation
of the Pennsylvania Medical Society



The Foundation
of the Pennsylvania Medical Society

BOARD OF TRUSTEES

We thank our Board of Trustees members for their leadership, dedication and insight that helped the Foundation *Raise the Bar for Program Excellence* in 2017.



Virginia E. Hall, MD,
FACOG, FACP - Chair



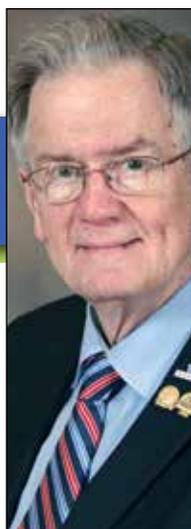
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CHAIR'S MESSAGE

In 2017, my first year as Foundation board chair, the powerful voice of women grew louder across our nation. I accepted the leadership role knowing that I am the first woman to chair the board since it officially became the Foundation. We are standing on the shoulders of pioneering women leaders who helped to form the Educational and Scientific Trust and the Pennsylvania Medical Society. I have been grateful for the opportunity to lead and we have achieved the worthwhile goal of restoring physicians to health and wholeness.

In this report you will read about the physicians we have served through the Physicians' Health Program (PHP). We highlight the strides that we made elevating LifeGuard to the national stage. *We have been committed to raising the bar for our programs.*

The accomplishment I am most proud of is the expansion of our scholarship opportunities and the medical student loan program. Without the

help of the Foundation, I would not have become a physician. It allowed me to spend my working life caring for others.

We recognize the impact a scholarship has on the diversity of our profession. I have been concerned that medical school is beginning to be something that is out of reach for bright students who do not have funding to pay the skyrocketing price tag. If only affluent individuals treat the population, I feel that they will not recognize food insecurity, nutritional challenges, transportation issues and cultural clashes. Our scholarships can help students achieve the dream of becoming physicians who help communities they know and love.

Thank you, donors, for your support now and in the future. You are helping us change the face of medicine in Pennsylvania!

Virginia Ettinger Hall, MD, FACOG, FACP
*Foundation of the Pennsylvania Medical Society
Board Chair*



Virginia Ettinger Hall, MD, FACOG,
FACP, Chair

RAISING THE BAR

We would like to thank our Board of Trustees, Foundation staff and many donors for their dedication to advancing the work of the Foundation. **You helped us to “Raise the Bar” in 2017.** We expanded our statewide programs by awarding the first Foundation Education Excellence Award and establishing the Shah Family Scholarship that will distribute its first award in 2018.

We expanded our addiction evaluation and treatment resources within the PHP and provided many presentations across the state on addiction and burnout/stress. We implemented a comprehensive practice monitoring pathway in LifeGuard. We expanded the roster of medical directors to enhance our depth of bench when monitoring practices. We turned a keen eye to the area of opioid and controlled substance prescribing. Our expanded roster includes: Steven Levy, MD, FACP; Raymond C. Truex Jr., MD, FAANS, FACS; and Jon Shapiro, MD, DABAM, MRO.

The gravitas of our programming continues to build as we not only lead at the state level, we also are active contributors to national forums that address physician issues:

- PHP Medical Director Jon Shapiro, MD, DABAM, MRO, was elected to the Federation of State Physician Health Programs (FSPHP) Board. He also serves on a committee.
- PHP Case Management Supervisor Tiffany Booher, MA, CAADC, CIP, CCSM, PHP Program Director Kendra Parry, MS, CADC, CIP, CCSM, and I participate in FSPHP committees.
- LifeGuard Program Director Marcia Lammando, RN, BSN, MHSA, was reappointed as adjunct assistant professor of Primary Care Medicine, Texas A&M University – College of Medicine. She was also named to the Coalition for Physician Enhancement Board of Directors. They focus on quality assurance, medical education, and the assessment, licensing, and accreditation of referred physicians seeking higher levels of performance in patient care.

I am proud of the work we have done this year and even more gratified to have the opportunity to lead with our talented and committed staff, trustees and philanthropic supporters as we advance the mission of the Foundation.

Heather A. Wilson, MSW, CFRE
Foundation Executive Director



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



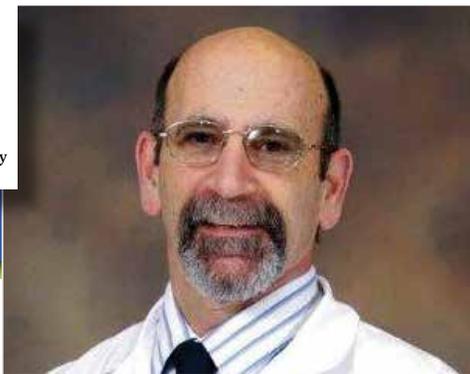
Physicians' HEALTH Program

The Foundation of the Pennsylvania Medical Society

The Physicians' Health Program (PHP) provides monitoring services to Pennsylvania physicians, physician assistants, dentists, and other eligible licensed professionals and trainees who are experiencing issues 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 Advisory Committee meets three times a year to help the PHP staff with program development and to make sure that we are operating with best practices. In 2017, the committee reviewed policies and procedures and discussed communication plans for ways to reach health care professionals in need and provide necessary program information to the health care professionals we serve.



Jon Shapiro, MD, DABAM, MRO

In 2017, PHP Medical Director Jon Shapiro, MD, DABAM, MRO, served on the Pennsylvania Medical Society Opioid Task Force as well as on the Cumberland/Perry County Opioid Advisory Committee.



Raymond Truex Jr., MD, FACS, FAANS

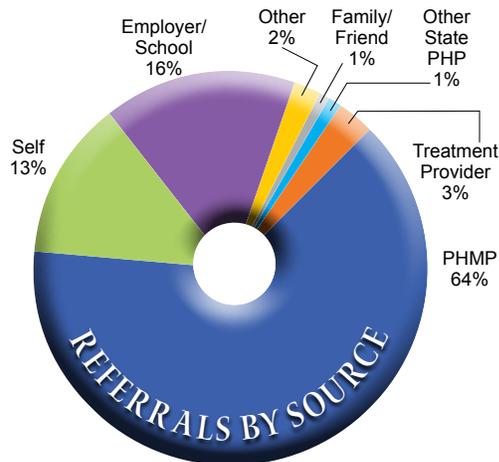
Raymond Truex Jr., MD, FACS, FAANS, joined the PHP staff in July 2017 as a medical director. The PHP is excited to have him help to lead our team and serve as a trusted guide for our participants. Dr. Truex formerly served as chair of the Foundation Board of Trustees.

PHP Presentations

- Philadelphia College of Osteopathic Medicine, *Philadelphia*
- University of Pennsylvania, *Philadelphia*
- Allegheny General Hospital, *Pittsburgh*
- DeSales University, *Center Valley*
- Berks County Medical Society, *Reading*
- Pennsylvania Primary Health Network, *Indiana*
- Holy Redeemer Hospital, *Meadowbrook*
- Allegheny County Medical Society, *Pittsburgh*
- Penn State Health St. Joseph Medical Center, *Reading*
- Penn State Health Milton S. Hershey Medical Center, *Hershey*
- Pennsylvania Board of Medicine, *Harrisburg*
- The Commonwealth Medical College, *Scranton*
- Crozer-Chester Medical Center, *Upland*
- Lancaster General Hospital, *Lancaster*

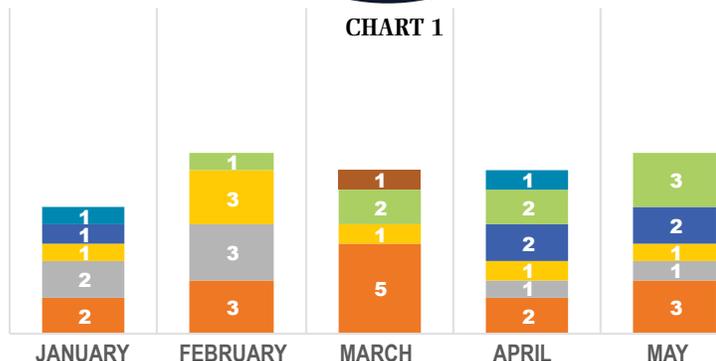
Exhibits

- Pennsylvania Society of Physician Assistants Annual Conference, *Valley Forge*
- Philadelphia Psychiatric Society Annual Addiction Symposium, *Jefferson University Hospital, Philadelphia*



2017 PHP PARTICIPANT AGREEMENTS

CHART 2



NATIONAL ENGAGEMENT

In 2017, the PHP continued to work with its peers in the Federation of State Physician Health Programs (FSPHP). PHP leadership attended the Annual Conference & Business Meeting in April where Jon Shapiro, MD, DABAM, MRO, was elected to the board representing the Northeast Region. The conference allows for the PHP staff to learn about other PHPs across the country and Canada. Dr. Shapiro serves on the Accountability, Consistency and Excellence (ACE) committee dedicated to updating the policies, procedures and guidelines for the operation of state PHPs. He is also an active member of the Library Task Force, which is designing an online resource to catalog PowerPoint presentations, articles and policies to be shared among PHPs. PHP staff participates in FSPHP:

- PHP Director **Kendra Parry MS, CADC, CIP, CCSM**, serves on the ACE Committee.
- Case Management Supervisor **Tiffany Booher, MA, CAADC, CIP, CCSM**, serves on the Task Force on Educational Materials.
- Executive Director **Heather Wilson, MSW, CFRE**, serves on the Fundraising Committee.

In November, the PHP successfully hosted the Northeast Region FSPHP Annual Membership Meeting, which was a great opportunity for collaboration. This educational activity facilitated communication of best practices among state PHPs while providing continuing medical education in the field of addiction and physician health.

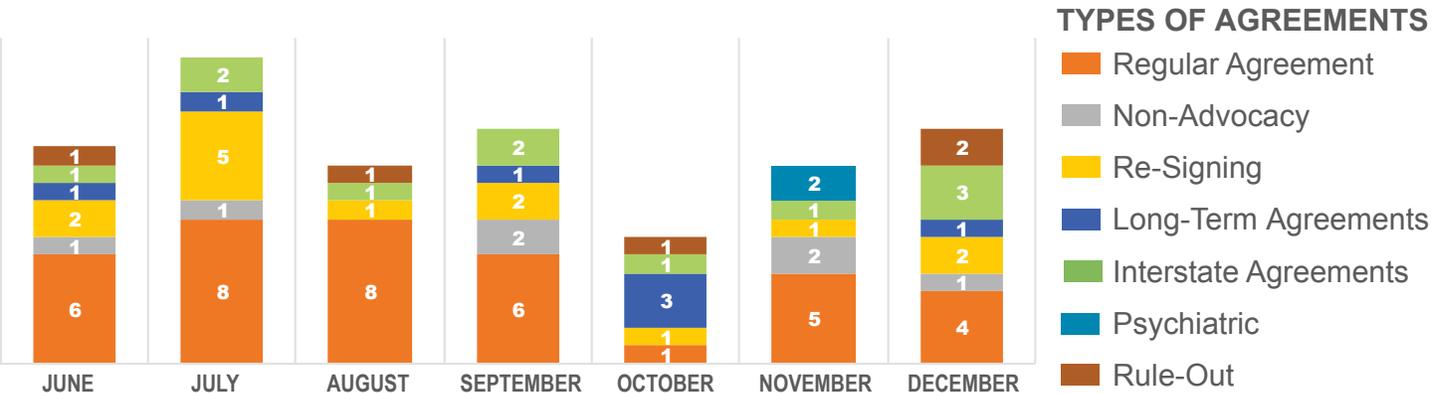
2017 STATISTICS

Total number of referrals: 267 cases

Percentage of referrals by source
(see chart 1)

Total number of active cases: 462
(at the end of 2017)

The PHP signed a total of 129 agreements in 2017 *(see chart 2)*





STUDENT FINANCIAL SERVICES

The Foundation of the Pennsylvania Medical Society

STUDENT FINANCIAL SERVICES

2017 Highlights:

To ease the stress of funding a medical education, the Foundation offers scholarships and affordable loans with personalized customer service to Pennsylvania residents attending medical school.

Generous contributions mean that medical students are able to fulfill their dreams of becoming physicians.

Since 1948, \$20.8 million in loans and scholarships has been awarded to 4,571 students.

Student Financial Services (SFS) is proud to help "Raise the Bar" for program excellence in 2017 and beyond.

- SFS awarded 70 loans totaling \$549,500
- \$64,100 increase over 2016 total loans
- The average individual loan award is \$7,850 compared to the average individual award of approximately \$5,644 in 2016
- Individual loan awards range between \$6,000 and \$10,000 per academic year
- SFS awarded 20 scholarships totaling \$48,577
- \$11,077 increase over 2016 total scholarships awarded
- Four additional scholarships awarded over the total number of 2016 scholarship awards
- The inaugural Foundation Education Award recipient was selected by the Foundation Board of Trustees.

Foundation Education Award

In 2017, the inaugural Foundation Education Award Fund was bestowed. The Foundation named **Anup Bhattacharya**, who attends Temple University, as the recipient. Anup also earned the Endowment for South Asian Students of Indian Descent Scholarship. A charter gift from Jeanne A. Cooper, MD, provided through the Pittsburgh Foundation, established the fund. The applicant pool for this award includes the current year's recipients of all other scholarship funds administered by the Foundation. This award is an additional recognition of the scholarship awardees' commitment to their education and their future medical career.

Shah Family Scholarship

Through a generous gift, Drs. Jintendra and Lina Shah established the Shah Family Scholarship. The first scholarship will be awarded in 2018. To be eligible for the scholarship, candidates must meet the following criteria:

- Resident of Philadelphia or Lower Bucks County.
- Bona-fide Pennsylvania resident at least 12 months prior to registering as a medical student.
- Enrolled full-time in an accredited Pennsylvania medical school as a first-year medical student.

The Foundation is deeply grateful to receive this substantial donation. The Foundation now administers 11 scholarship funds.

Alliance Medical Education Scholarship (AMES) Fund Recipients



Alliance Medical Education Scholarship (AMES) Fund Recipients

The 2017 Alliance Medical Education Scholarship was awarded to 9 deserving medical students. Each recipient is a second- or third-year medical student who is a Pennsylvania resident enrolled full-time in a Pennsylvania medical school.

Award recipients gather with Barbara Prendergast and Arlene Oyler for a group photo at the Alliance's annual fundraising benefit on Oct. 14, 2017, in Hershey, Pa.

2017 SCHOLARSHIP RECIPIENTS

Allegheny County Medical Society Medical Student Scholarship

Akshaya Arjunan of Allegheny County

University of Pittsburgh School of Medicine



Alexander Adams



Akshaya Arjunan

Alliance Medical Education Scholarship

Alexander J. Adams of Chester County

Sidney Kimmel Medical College at Thomas Jefferson

Elisa Giusto of Luzerne County

Philadelphia College of Osteopathic Medicine

Evan A. Jones of Lackawanna County

Lewis Katz School of Medicine at Temple University

Alexis J. Lukach of Montgomery County

University of Pittsburgh School of Medicine

Linda C. Magana of Chester County

Sidney Kimmel Medical College at Thomas Jefferson

Ramzy T. Nagle of Philadelphia County

Sidney Kimmel Medical College at Thomas Jefferson

Rachel Z. Polinski of Bradford County

Geisinger Commonwealth School of Medicine

Carly E. Sokach of Luzerne County

Sidney Kimmel Medical College at Thomas Jefferson

Adam J. Weaver of Blair County

Philadelphia College of Osteopathic Medicine



Anup Bhattacharya



Anna Bistline



Patrick Collins



Elisa Giusto



Christian Hague



Miranda Haslam

Endowment for South Asian Students of Indian Descent Scholarship

Anup K. Bhattacharya of Delaware County

Lewis Katz School of Medicine at Temple University



Evan Jones



Alexis Lukach

Foundation Education Award

Anup K. Bhattacharya of Delaware County

Lewis Katz School of Medicine at Temple University



Linda Magana



Ramzy Nagle

Lehigh County Medical Auxiliary Scholarship and Education Fund

Patrick J. Collins of Lehigh County

University of South Florida College of Medicine



Rachel Polinski



Kenan Rajjoub

Lycoming County Medical Society Scholarship

Christian M. Hague of Lycoming County

Geisinger Commonwealth School of Medicine

Kenan R. Rajjoub of Lycoming County

George Washington University School of Medicine



Megan Raymond



Carly Sokach

Montgomery County Medical Society William W. Lander, MD, Scholarship

Megan Raymond of Montgomery County

University of Pittsburgh School of Medicine

Sitara Soundararajan of Montgomery County

Drexel University College of Medicine



Sitara Soundararajan



Kent Upham

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

Miranda E. Haslam of Berks County

Lewis Katz School of Medicine at Temple University

Scott A. Gunder, MD, DCMS Presidential Scholarship

Kent D. Upham of Bradford County

Penn State University College of Medicine



Adam Weaver

*Total Students 19 — Total Awards 20 — Total Amount \$48,577.00



LIFEGUARD

In 2017, LifeGuard raised the bar for program excellence and expanded offerings. Program enrollment grew by 21 percent.

LifeGuard, a nationally recognized program, is a vanguard for addressing clinical competency assessment needs for physicians and other healthcare professionals. Conceptualized by doctors for doctors, LifeGuard provides comprehensive assessment services and recommendations for remediation tailored to individual needs.

Through individually customized programs, LifeGuard provides an unbiased assessment of physician clinical performance with the goal of enhancing patient safety and quality of care.

In 2017, 40 physicians enrolled in LifeGuard:

21 Pennsylvania Physicians

19 Out-of-State Physicians

	Completed the program in 2017	Enrolled in 2017 and program completion is anticipated for 2018
Fitness for Duty/Late Career		
Re-Entry		
Re-Instatement/Disciplinary		
Quality of Care		
Practice Monitoring		
TOTAL	22	18

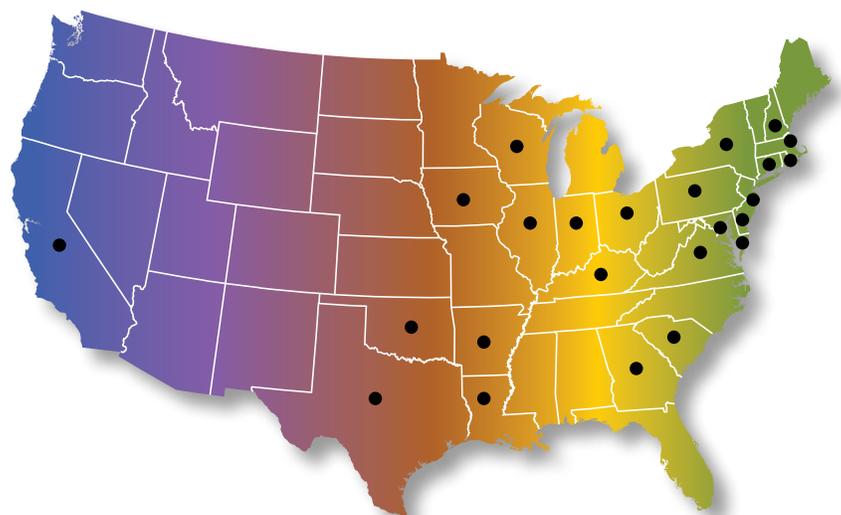
LifeGuard developed and offered a new practice monitoring pathway for physicians with a focus on three key areas:

- Controlled Substance & Opioid Prescribing
- Professionalism Concerns
- Quality of Care Concerns

LifeGuard expanded CME offerings to include:

- Medical Records and Documentation
- Intensive Controlled Substance & Opioid Prescribing often required by licensing boards for physicians with prescribing concerns (2-day course, 25.5 CMEs)
- Intensive Controlled Substance & Opioid Prescribing course designed for hospitals and medical groups (1-day course)

Since inception, LifeGuard has served physicians in 23 states and the District of Columbia



FINANCIAL HIGHLIGHTS

2017 in Numbers*

For the Years Ended December 31, 2017 and 2016

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

ASSETS, LIABILITIES & NET ASSETS

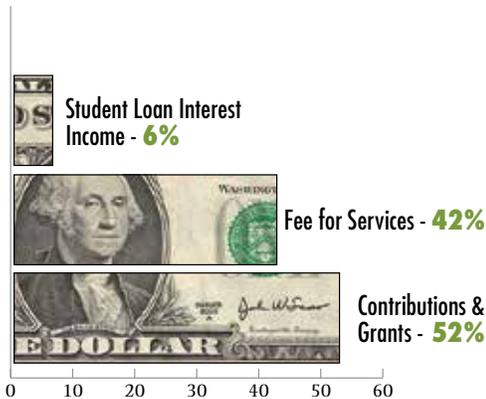
	2017	2016
Assets	\$14,413,003	\$13,177,941
Liabilities	\$ 2,609,053	\$ 2,608,154
Net Assets	\$11,803,950	\$10,569,787

SUMMARY OF REVENUES & EXPENSES

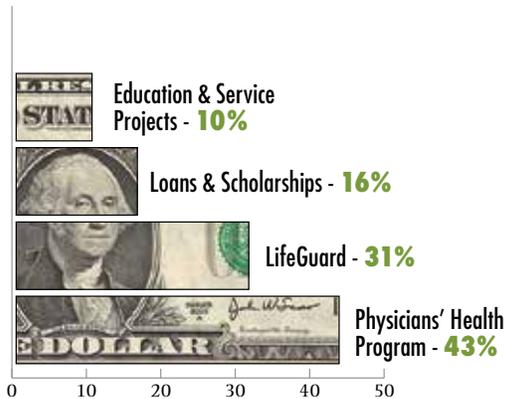
	2017	2016
Contributions and Grants	\$ 1,296,331	\$ 1,125,188
Fee For Service	\$ 1,048,797	\$ 949,081
Student Loan Interest Income	\$ 158,257	\$ 141,102
Investment and Other Revenues	\$ 1,110,312	\$ 410,717
Total Expenses	(\$2,466,239)	(\$2,036,399)
Excess Revenue Over Expenses	\$ 1,147,458	\$ 589,689

*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

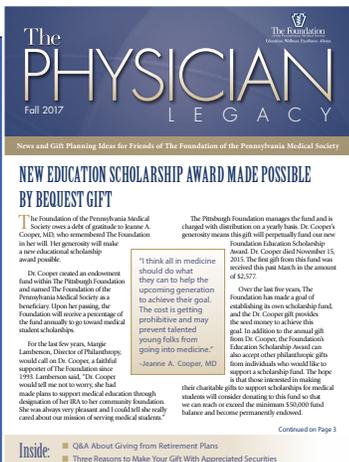
The Foundation of the Pennsylvania Medical Society Fellows is an elite group who made provisions to advance the work of the Foundation in the areas of education, wellness and clinical excellence. Utilizing a variety of estate planning tools, such as bequest gifts, charitable gift annuities and trusts,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

Anonymous

Dr. Doris G. Bartuska*
Dr. and Mrs. Jasper G. Chen Sec*
Dr. and Mrs. James M. Cole*
Dr. Jeanne A. Cooper*
Drs. Harold R. Cottle* and Betty L. Cottle
Dr. David Smith* and Mrs. Nancy C. Davis
Drs. Jitendra M. Desai and Saryu J. Desai
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Drs. Jitendra N. Shah and Lina J. Shah
Dr. Ferdinand L. Soisson Jr. and
Mrs. Dorothy* L. Soisson
Dr. and Mrs. Fred Teichman
Dr. Raymond C. Truex Jr.
Dr. and Mrs. George J. Vukmer
Dr. and Mrs. Leonard B. Zadecky

* Deceased



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 contact Lori Storm at lstorm@pamedsoc.org or 717.558.7861.



Lori M. Storm was named manager, Philanthropy and Hospital Relations.

“Thank you for donating to our philanthropic mission in 2017. You helped us to raise the bar for our program excellence now and in the future.”

Contact Lori at lstorm@pamedsoc.org or (717) 558-7861.

HOSPITAL SUPPORT

AMBASSADOR

\$10,000 AND ABOVE

Geisinger Medical Center – M & H
Lehigh Valley Hospital – Cedar Crest, Hazleton,
Muhlenberg, Schuylkill – M & H
Penn Medicine at Chester – M
St. Luke's University Health Network-
Bethlehem Campus – M & H
WellSpan York Hospital – M & H

VISIONARY

\$5,000 TO \$9,999

Holy Redeemer Hospital and Medical Center –
M & H
Main Line Health, Inc. – M & H
Mount Nittany Medical Center – M & H
Penn Medicine Lancaster General Health –
M & H
Penn State Health Milton S. Hershey Medical
Center – M & H
Reading Hospital/Reading Health System –
M & H
Thomas Jefferson University Hospital –
M & H
UPMC Altoona – M & H
UPMC East – M
WellSpan Gettysburg Hospital – M & H
UPMC Hamot Medical Center – M
UPMC Passavant – M

LEADER

\$2,500 TO \$4,999

Abington Hospital – Jefferson Health – M & H
Allegheny General Hospital – M
Chambersburg Hospital – M & H
Doylestown Hospital – M & H
Easton Hospital – M & H
Einstein Medical Center Montgomery – M
Evangelical Community Hospital – M & H
Excela Health – M
Forbes Hospital – M & H
Grand View Hospital – M & H
Indiana Regional Medical Center – M & H
Jefferson Regional Medical Center – M & H
Lehigh Valley Hospital – Pocono – M & H
Moses Taylor Hospital – M
Ohio Valley General Hospital – M & H

Sacred Heart Hospital – M & H
Saint Vincent Health System – M
St. Mary Medical Center – M & H
The Western Pennsylvania Hospital – M
UPMC Horizon – M & H
UPMC McKeesport – M
UPMC Pinnacle Hanover – M & H
UPMC Pinnacle Harrisburg – M
UPMC St. Margaret – M
Washington Health System – M & H
WellSpan Ephrata Community Hospital –
M & H
WellSpan Good Samaritan Hospital – M & H

GUARDIAN

\$1,000 TO \$2,499

Abington – Lansdale Hospital – M & H
Aria Health – M
Blue Mountain Health System – M
Brandywine Hospital – M
Butler Health System – M
Charles Cole Memorial Hospital – M & H
Chestnut Hill Hospital – M
Conemaugh Memorial Medical Center – H
Eagleville Hospital – H
Einstein Medical Center Philadelphia – M
Grove City Medical Center – M & H
Hahnemann University Hospital – M
Heritage Valley Health System – Beaver – M
Heritage Valley Health System – Sewickley – M
Jeanes Hospital – M & H
Lower Bucks Hospital – M & H
Magee-Womens Hospital of UPMC Health
System – M
Meadville Medical Center – M & H
Monongahela Valley Hospital – M & H
Penn Highlands DuBois – M & H
Phoenixville Hospital – M
Pottstown Hospital Tower Health – M
Roxborough Memorial Hospital – M & H
Sharon Regional Health System – M & H
Soldiers and Sailors Memorial Hospital –
M & H
Somerset Hospital – M & H
St. Christopher's Hospital for Children – M
St. Clair Memorial Hospital – M
St. Luke's Hospital & Health Network –
Quakertown – M

Suburban Community Hospital –
East Norriton – M & H
Temple University Hospital – M & H
Uniontown Hospital – M & H
UPMC – Bedford Memorial – M & H
UPMC Pinnacle Lancaster – M
UPMC Susquehanna – M & H
Wilkes-Barre General Hospital – M & H

BENEFACTOR

\$500 TO \$999

Bradford Regional Medical Center – M
Children's Hospital of Philadelphia – M
Fox Chase Cancer Center – M
Good Shepherd Rehabilitation – M
Lehigh Valley Hospital – Schuylkill E. Norwegian
Street – M & H
Millcreek Community Hospital – M & H
Muncy Valley Hospital – M & H
Penn Highlands Clearfield – M & H
Penn Highlands Elk – M
Penn State Health St. Joseph – M
The Guthrie Clinic/Robert Packer Hospital – M
Tyrone Hospital – M
UPMC Northwest – Seneca – M
UPMC Pinnacle Lititz – M
UPMC Susquehanna Sunbury – M
Washington Health System Greene – M
Waynesboro Hospital – M

PARTNER

\$100 TO \$499

Clarks Summit State Hospital – M
Conemaugh Miners Medical Center – M & H
Corry Memorial Hospital – M
Ellwood City Hospital – M
Penn Highlands Brookville – M & H
Titusville Area Hospital – M
UPMC Kane – M & H
Wernersville State Hospital – M
Windber Medical Center – M

M = Medical Staff Donation

H = Hospital Administration Donation

M & H = Medical Staff & Hospital Administration
Donation

THANK YOU FOR YOUR SUPPORT

of the Foundation
through your
philanthropic gifts
during 2017

Giving Club membership is based on a donor's total gifts for the fiscal year January 1 to December 31, 2017. Annual gifts, planned gifts, endowment gifts and matching gifts to any of the Foundation's programs qualify an individual for membership in a giving club.

GIVING CLUB ANNUAL GIVING LEVEL

AMBASSADOR
\$10,000 OR MORE

VISIONARY
\$5,000 TO \$9,999

LEADER
\$2,500 TO \$4,999

GUARDIAN
\$1,000 TO \$2,499

BENEFACTOR
\$500 TO \$999

PARTNER
\$100 TO \$499

CONTRIBUTOR
UP TO \$99

Please see
www.foundationpamedsoc.org
for our contributor list.

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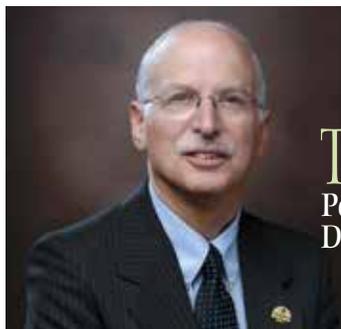
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The Foundation of the Pennsylvania Medical Society provides programs and services for individual physicians and others that improve the well-being of Pennsylvanians and sustain the future of medicine.



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