The Foundation of the Pennsylvania Medical Society

2017

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.

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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

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
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.

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.

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 1

CHART 2
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)*

#### TYPES OF AGREEMENTS

- **Regular Agreement**
- **Non-Advocacy**
- **Re-Signing**
- **Long-Term Agreements**
- **Interstate Agreements**
- **Psychiatric**
- **Rule-Out**
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.

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.

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.
2017 SCHOLARSHIP RECIPIENTS

Allegheny County Medical Society Medical Student Scholarship

Akshaya Arjunan of Allegheny County — University of Pittsburgh School of Medicine

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

Blair County Medical Society Scholarship

Anna K. Bistline of Blair County — Sidney Kimmel Medical College at Thomas Jefferson

Endowment for South Asian Students of Indian Descent Scholarship

Anup K. Bhattacharya of Delaware County — Lewis Katz School of Medicine at Temple University

Foundation Education Award

Anup K. Bhattacharya of Delaware County — Lewis Katz School of Medicine at Temple University

Lehigh County Medical Auxiliary Scholarship and Education Fund

Patrick J. Collins of Lehigh County — University of South Florida College of Medicine

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

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

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

Total Students 19 — Total Awards 20 — Total Amount $48,577.00
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, LifeGuard raised the bar for program excellence and expanded offerings. Program enrollment grew by 21 percent.

<table>
<thead>
<tr>
<th></th>
<th>Completed the program in 2017</th>
<th>Enrolled in 2017 and program completion is anticipated for 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fitness for Duty/Late Career</td>
<td></td>
<td></td>
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<tr>
<td>Re-Entry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Re-Instatement/Disciplinary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of Care</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Practice Monitoring</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>22</td>
<td>18</td>
</tr>
</tbody>
</table>

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)

<table>
<thead>
<tr>
<th>ASSETS, LIABILITIES &amp; NET ASSETS</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assets</td>
<td>$14,413,003</td>
<td>$13,177,941</td>
</tr>
<tr>
<td>Liabilities</td>
<td>$ 2,609,053</td>
<td>$ 2,608,154</td>
</tr>
<tr>
<td>Net Assets</td>
<td>$11,803,950</td>
<td>$10,569,787</td>
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</tbody>
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<table>
<thead>
<tr>
<th>SUMMARY OF REVENUES &amp; EXPENSES</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contributions and Grants</td>
<td>$1,296,331</td>
<td>$1,125,188</td>
</tr>
<tr>
<td>Fee For Service</td>
<td>$1,048,797</td>
<td>$ 949,081</td>
</tr>
<tr>
<td>Student Loan Interest Income</td>
<td>$ 158,257</td>
<td>$ 141,102</td>
</tr>
<tr>
<td>Investment and Other Revenues</td>
<td>$1,110,312</td>
<td>$ 410,717</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>($2,466,239)</td>
<td>($2,036,399)</td>
</tr>
<tr>
<td>Excess Revenue Over Expenses</td>
<td>$1,147,458</td>
<td>$ 589,689</td>
</tr>
</tbody>
</table>

*Unaudited

REVENUE SOURCES

<table>
<thead>
<tr>
<th>Student Loan Interest Income - 6%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee for Services - 42%</td>
</tr>
<tr>
<td>Contributions &amp; Grants - 52%</td>
</tr>
</tbody>
</table>

TOTAL PROGRAM SERVICES

| Education & Service Projects - 10% |
| Loans & Scholarships - 16%         |
| LifeGuard - 31%                    |
| Physicians’ Health Program - 43%   |

ANNUAL OPERATING EXPENSES

- 18 Cents of Every Dollar Goes to Management and General Administration
- 8 Cents of Every Dollar Goes to Fundraising
- 74 Cents of Every Dollar Goes to Program Services
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.

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’ Deceased

The Physician Legacy

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.

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

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.
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
Doyles-town Hospital – M & H
Easton Hospital – M & H
Einstein Medical Center Montgomery – M
Evangelical Community Hospital – M & H
Excelsior 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
Suburban Community Hospital – East Norriton – M & H
Temple University Hospital – M & H
Univestory Hospital – M & H
UPMC Bedford Memorial – M & H
UPMC Pinnacle Lancaster – M
UPMC Susquehanna – M & H
Wilkes-Barre General 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 – M
Eagleville Hospital – M
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
Jeans Hospital – M & H
Lower Bucks Hospital – M & H
Mage-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

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.

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In partnership with Penn Medicine, LifeGuard offers a comprehensive program led by Penn Medicine faculty, that covers prescribing issues identified by state boards of medicine for physicians who want to become more comfortable with the guidelines. We also offer practice monitoring and sessions for remediation when prescribing practices are called into question.

COMING SOON: BEST PRACTICES AND COMMUNICATIONS COURSE

This course is a three-day educational program aimed at enhancing medication prescribing behaviors and will examine this important topic from legal, regulatory, biomedical, clinical, patient, and patient safety perspectives.

This course is designed to address provider-patient as well as provider-provider communications. Attendees will learn to enhance their patient-centered interviewing skills and will also review best practices in healthcare team communication.

Designation & Accreditation Statement:
These two activities have been planned and implemented in accordance with the accreditation requirements and policies of the Accreditation Council for Continuing Medical Education through the joint providership of the Pennsylvania Medical Society and The Foundation. The Pennsylvania Medical Society is accredited by the ACCME to provide continuing medical education for physicians.

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Learning Objectives:
- Improve their communication with patients and healthcare peers
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