2024 IMPACT REPORT



STRAIGHT TO THE HEART.



The mission of The Foundation of the Pennsylvania Medical Society is to provide 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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MESSAGE FROM THE BOARD CHAIR



At The Foundation of the Pennsylvania Medical Society, a diverse and generous group of donors fuel our mission to serve physicians and health care professionals. The year 2024 was a period of exceptional growth for The Foundation. We were proud to introduce the Trudell Medical Excellence Scholarship, expanding our scholarship programs and awarding a total of \$149,300 to medical students to ease the burden of their education costs.

Guided by our belief that every patient deserves care from a team that is mentally, emotionally, and physically healthy, we

achieved significant milestones. On January 1, 2024, The Foundation expanded its Peer Assistance Monitoring Services and launched the Nurses' Health Program, supporting approximately 500 nursing professionals. Together with the addition of pharmacists in 2023, the inclusion of nursing professionals tripled the number of individuals served in our Peer Assistance Monitoring Programs. With humility and gratitude, we acknowledge our Advisory Committee members who represent the licensees we serve. Their expertise is the foundation of our programs and processes, allowing us to act as a trusted and confidential resource for health care professionals and trainees dealing with substance use disorders, mental health challenges, and behavioral concerns.

Our unwavering commitment to the well-being of all health care team members inspired efforts to reduce stigma and normalize seeking help in 2024. We recognize that support and care from those around us are vital for everyone. This work is made possible by our dedicated volunteer board of trustees, advisory committees, staff, and trustees individuals who lead with thoughtfulness, compassion, and generosity. To our donors, I extend heartfelt gratitude. Your philanthropic contributions save careers, change lives, and ensure a vibrant future for Pennsylvania's medical community.

Thank you for being part of this transformative journey. Together, we make a lasting impact.

Virginia E. Hall, MD, FACOG, FACP

Virginia & Hall M)

Chair, The Foundation of the Pennsylvania Medical Society

MESSAGE FROM THE EXECUTIVE DIRECTOR



The **2024 Annual Impact Report** highlights a year of exceptional growth and programmatic expansion, as we continued to support physicians and other safety-sensitive professionals within the health care community. This past year, The Foundation strengthened the heart of our medical communities by:

- Expanding Peer Assistance Monitoring Programs. We extended our services to include individuals licensed under the Commonwealth's Board of Nursing, achieving our strategic plan goal of supporting a healthy and safety-sensitive workforce through peer monitoring.
- Advancing Medical Education Access. Over \$149,000 in scholarship awards were distributed to medical students, reinforcing our mission to make the dream of becoming a doctor more accessible for all.
- Reducing Mental Health Stigma. We successfully advocated for changes in licensing questions, aligning with the Wellbeing First Champion movement of the Dr. Lorna Breen Heroes' Foundation to eliminate intrusive mental health queries and reduce stigma.
- Enhancing Clinical Competency Assessments. The LifeGuard® program achieved a proposal acceptance rate of 88%, a programmatic high. Our expert staff and faculty delivered confidential and unbiased clinical competency assessments, ensuring quality of care, fitness for duty, and practice monitoring.

Every dollar donated to The Foundation of the Pennsylvania Medical Society embodies kindness, gratitude, and strength. Our mission thrives because of the generous support we receive from the Pennsylvania Medical Society, hospitals (including medical staff leadership and administration), county and specialty societies, as well as corporate and individual donors. Your contributions demonstrate an unwavering commitment to the medical community, ensuring that the auscultations of The Foundation remain strong. With profound gratitude and appreciation, I extend heartfelt thanks.

Heather A. Wilson, MSW, CFRE, CAE

Executive Director

Heather C. Liston

PEER ASSISTANCE MONITORING PROGRAMS

The Foundation of the Pennsylvania Medical Society Reaches Strategic Milestone by Adding **Nurse Peer Assistance Monitoring Program**

Effective, January 1, 2024, The Foundation of the Pennsylvania Medical Society achieved a significant milestone in its efforts to support safety-sensitive professionals in the health care team: The Foundation was awarded the contract for Nurse Peer Assistance Monitoring in the Commonwealth.

To address the unique needs of nurses, dietitian-nutritionists, and their students, **The** Foundation launched the Nurses' Health Program (NHP). This initiative expands its long-standing commitment to assisting health care professionals with challenges related to substance use, mental health, and behavioral concerns.

In preparation for this growth, The Foundation hired and trained a dedicated team, including five case managers, a part-time medical director, an administrative assistant, and two licensed nurse consultants. This team is committed to delivering exceptional services to program participants. Stakeholders can meet the team and learn more about the NHP at www.panhp.org.

Building on the reliable services of the Physicians' Health Program, the NHP aims to become a trusted ally for health systems, private employers, educational institutions, and other stakeholders. The Foundation remains steadfast in its mission to support the evolving needs of safety-sensitive professionals in the Commonwealth.

The NHP invites all stakeholders to reach out as partners in supporting professionals and ensuring their ability to thrive in their chosen fields.



PENNSYLVANIA PHYSICIANS' HEALTH PROGRAM

For more than 35 years, the PA PHP has provided 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 and other behavioral concerns. The services of the PA PHP are confidential.



PA PHP MISSION

Our mission is to promote early identification and facilitate rehabilitation of physicians and other eligible health care professionals and trainees with concerns relating to substance use disorders, mental health disorders, and/or behavioral concerns. Our goal is to coordinate assessment and treatment as well as provide monitoring and advocacy to ensure the safe practice of their profession, and the safety of the public.



The Foundation of the Pennsylvania Medical Society

PENNSYLVANIA PHYSICIANS' HEALTH PROGRAM

October 1, 2023, the PHP welcomed pharmacists and student pharmacists to peer assistance monitoring services in the PHP.

IN 2024, THE PA PHP: Received 197 total referrals Signed 83 agreements Average number of cases monitored per month in 2024 = 360 cases

Total Number of Agreements	83
Substance Use Disorder	41
Re-signing	16
Interstate	12
Sobriety Challenge	9
Psychiatric	2
Long-Term	3
Lifetime Agreements	0
Non-Advocacy	0
Occupational	0

Referrals by License Type

DDS	9
DHY	11
DMD	8
DO	33
DPM	3
EFDA/DASST	8
MD	70
PA/PAC	9
ST	15
VMD	1
PharmD	16
RPh	14

18 total Educational Presentations

16 Participant Assistance Fund Scholarships were awarded in 2024, totaling \$3,687.50.

The PA PHP continues to be involved with the Federation of State Physician Health Programs.

- Executive Director of The Foundation, Heather Wilson, MSW, CFRE, CAE is on the Board of Directors and Fundraising Committee.
- Program Director, Tiffany Booher, MA, LPC, CAADC, CIP, CCSM is on the Performance Enhancement and Effectiveness Review Committee.
- Medical Director, Raymond Truex, Jr. MD, FACS, FAANS is on the Membership Committee and Nominating Committee.
- · Medical Director, Edwin Kim, MD, DABPN, MRO serves on the Board of Directors as President-Elect and is part of the Publications Committee, Public Policy Committee, and Ethics Committee.

PENNSYLVANIA NURSES' HEALTH PROGRAM

The mission of the Nurses' Health Program is to promote early identification and facilitate rehabilitation of nurses, dietitian-nutritionists, and student nurses with concerns relating to substance use disorder, mental health disorders, and/or behavioral concerns.

IN 2024, THE PA NHP:

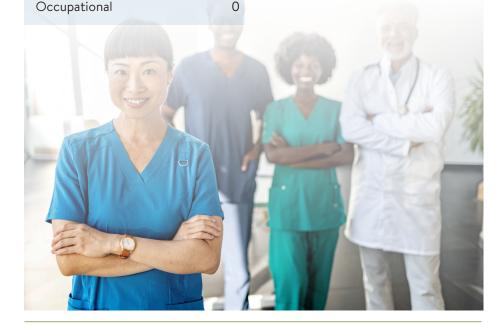
Received 858 total referrals Signed 144 agreements

Average number of cases monitored

per month in 2024 = 749 cases

Total Number of Agreements 144 Substance Use Disorder 115 Re-signing 10 Interstate Sobriety Challenge 15 Psychiatric 2 0 Long-Term Lifetime Agreements 0 Non-Advocacy 1

Referrals by License Type	
CRNA	1
CRNP	18
LDN	6
LPN	303
RN	527
ST	3





The Foundation of the Pennsylvania Medical Society supports medical students by easing their financial burden with low-cost student loans and scholarships. Pennsylvania residents attending medical school enjoy

personalized customer service tailored to their unique needs.

With the power of your generosity, the future of medical education is affordable. Since 1948, The Foundation awarded loans and scholarships totaling \$25,590,162 to 4,893 students.

LOANS

In 2024, The Foundation awarded \$795,000 in loans to 62 students. Loan awards increased 8% or nearly \$65,000 over the 2023 awards.

The interest rate on Foundation loans disbursed for the 2024-2025 academic year was more than 2% and 3% lower than federal student loans.

Students at 8 accredited medical schools across Pennsylvania received a loan in 2024.

"The Foundation loan has played a vital role in supporting our students at PCOM, providing them with the financial resources they need to pursue their medical education and training. By reducing the financial burden, the loan allows our students to focus more on their studies, clinical experiences, and ultimately, their future careers in healthcare. We are deeply grateful for the ongoing partnership with The Foundation and for the continued support of our future physicians."

 Dez Nixon, Assistant Director of Financial Aid and Financial Wellness Coordinator, Philadelphia College of Osteopathic Medicine (PCOM)



PCOM, thank you for being a loan partner committed to supporting future physicians.



SCHOLARSHIPS

The Foundation awarded **28 Scholarships** totaling **\$149,300 to 24 medical** students. Scholarship support increased by **\$43,900** over 2023.

The Foundation Celebrates the Trudell Medical Excellence Scholarship

In 2024, The Foundation announced the creation of the **Trudell Medical Excellence Scholarship**, thanks to the incredible generosity of Gene and Cyndee Trudell from the Pittsburgh area. The scholarship is a **\$15,000 annual award**, the largest ever established by The Foundation, and will support a fourth-year medical student who ranks in the top 10% of their class and is committed to a career in cardiac surgery, otolaryngology surgery, or pediatric oncology.

Personal experiences with these specialties have deeply inspired the Trudells' giving. Cyndee received the gift of hearing from an otolaryngology surgeon and her father permanently lost his hearing due to a military related accident in WWII. Gene underwent multiple life-saving cardiac surgeries and their daughter, who passionately serves as a nurse, had a friend pass away from a rare blood cancer.

Gene said, "The Foundation was a 'perfect fit' to significantly help a medical student." The Foundation invests in future physicians with the gift of medical education, guides eligible medical professionals to achieve a life free from substance use disorders, and delivers hope to those whose clinical competency is called into question.

Watch a video on the Trudell's full story to learn more: https://www.foundationpamedsoc.org/trudellscholarship



Allegheny County Medical Society Medical Student Scholarship Alliance Medical Education Scholarship



Britney Fitzgerald Penn State University College of Medicine Class of 2025 \$4,000



Masashi Azuma Lewis Katz School of Medicine at Temple University Class of 2026 \$2,500



Lena G. Becker Penn State University College of Medicine Class of 2026 \$2,500

Alliance Medical Education Scholarship



Isabela C. Guet-Cruza Barbara Prendergast Award Lewis Katz School of Medicine at Temple University Class of 2027 \$2,500



Sidney Kakabar Lake Erie College of Osteopathic Medicine Class of 2026 \$2,500



Jay Pendyala Robert and Arlene Oyler Award Sidney Kimmel Medical College at Thomas Jefferson University Class of 2027 \$3,000

Alliance Medical Education Scholarship



Safitaj Sindhar Dauphin County Medical Society Alliance Award Penn State University College of Medicine Class of 2026 \$2,500

Endowment for South Asian **Students of Indian Descent Scholarship**



Nikhil Ganjoo Perelman School of Medicine at University of Pennsylvania Class of 2026 \$5,000



Siena G. Wanders Dr. William J. West Jr. Award Lewis Katz School of Medicine at Temple University Class of 2027 \$3,000

Foundation Education Award Scholarship



Vershawn C. Hansen Drexel University College of Medicine Class of 2028 \$7,500

Dr. Satish & Rupal Shah Family Scholarship



Cain M. Dudek Penn State University College of Medicine Class of 2025 \$3,300

Lehigh County Medical Auxiliary's Scholarship and **Education Fund**



Nehali Gupta New York Medical College Class of 2027 \$6,000

Lina & Jitendra Shah Scholarship



Isha V. Gadgil Drexel University College of Medicine Class of 2028 \$5,000



Vershawn C. Hansen Drexel University College of Medicine Class of 2028 \$5,000

Lina & Jitendra Shah Scholarship



Megan Kozar Sidney Kimmel Medical College at Thomas Jefferson University Class of 2028 \$5,000



Alexis Zazvrskey Sidney Kimmel Medical College at Thomas Jefferson University Class of 2027 \$5,000

Lycoming County Medical Society Scholarship



Alexandra N. McQuillen Philadelphia College of Osteopathic Medicine Class of 2025 \$6,000



Cade V. Neal Geisinger Commonwealth School of Medicine Class of 2028 \$6,000

Scott A. Gunder, **MD, DCMS Presidential** Scholarship



Safitaj Sindhar Penn State University College of Medicine Class of 2026 \$1,500

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



Emma R. Kotes University of Pittsburgh School of Medicine Class of 2028 \$2,500



M. Heath Patterson Drexel University College of Medicine Class of 2028 \$2,500

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



Sarah Raab Philadelphia College of Osteopathic Medicine Class of 2028 \$2,500

Snyder, Union and Northumberland Counties Medical Student Scholarship



Lena G. Becker Penn State University College of Medicine Class of 2026 \$10,000



Adam Cole Geisinger Commonwealth School of Medicine Class of 2026 \$10,000



Cain M. Dudek Penn State University College of Medicine Class of 2025 \$10,000

Trudell Medical Excellence Scholarship



Jacob Kuzy Drexel University College of Medicine Class of 2025 \$15,000



Salena Ringenbach Lewis Katz School of Medicine at Temple University Class of 2025 \$15,000





Allyson M. Derry Lewis Katz School of Medicine at Temple University Class of 2027 \$4,000

LIFEGUARD® PROGRAM

LifeGuard[®] is a nationally recognized program that promotes patient safety and quality of care by providing comprehensive and individualized clinical assessments and educational remediation plans for physicians and other health care professionals referred to our program.



2024 Program Participant Completion

Re-Test NBME only	1
Practice Monitoring	1
ATM(assessment, training, monitoring Program-	
CDS prescribing)	1
Focused Chart Review	2
Professionalism Enhanced	3
Active Retired Physician- PA Only	3
ABEM Program	3
Re-Entry/Reinstatement	9
Quality of Care	13
Fitness for Duty	13

2024 Achievements

- 62 participants were enrolled in various programs throughout the calendar year 2024.
- 49 participants completed their respective programs in 2024.
 - 22 participants were from PA.
 - 27 participants were out-of-state participants (To date, LifeGuard® has worked with participants in 31 states and the District of Columbia).
 - Out-of-state participants in 2024 were primarily from the following 13 states: KY, NJ, NC, MA, CT, MI, AZ, TX, OH, RI, GA, NY, WV
- The proposal acceptance rate in 2024 was 88%, the highest acceptance rate to date.
- In 2024, LifeGuard® received 97 inquiries regarding LifeGuard® services.

LIFEGUARD® PROGRAM

Notable LifeGuard® News

LifeGuard® ABEM re-eligibility PREP program has been extraordinarily successful. In 2024, three physicians completed the six-month program. Since finishing the program, two have passed their qualifying exams, while the third has successfully gained re-eligibility to sit for the exam. As we move into 2025, LifeGuard® currently has five active participants in different stages of the six-month program.

In 2024, LifeGuard® initiated a comprehensive survey process for all participants completing an assessment process as well as for those applicants who chose not to proceed with LifeGuard® for their assessment. This effort is aimed at collecting pertinent data to gain valuable insights, make informed decisions, and facilitate ongoing improvement in the LifeGuard® program.

LifeGuard® program Director, Tracey Ziegler RN, BSN is now a sitting member of the Coalition for Physician Enhancement (CPE) Board of Directors as a representative of LifeGuard®. The CPE is a consortium of professionals in the United States and Canada, with expertise in quality assurance, medical education, and the assessment, licensing, and regulation of referred physicians seeking higher levels of performance in patient care.



FINANCIALS

2024 IN NUMBERS

Combined Financial Highlights (The Foundation, PAMED Charitable Trust, Medical Legacy Fund) *Unaudited 2024 financials

ASSETS, LIABILITIES & NET ASSETS

	2024*	2023
Assets	\$20,618,768	\$18,761,620
Liabilities	\$1,363,066	\$1,333,339
Net Assets	\$19,255,702	\$17,428,281

SUMMARY OF REVENUES & EXPENSES

	2024*	2023
Contributions and Admin Grants	\$1,600,945	\$1,370,536
Fee for Service	\$2,281,829	\$944,139
Student Loan Interest Income	\$236,738	\$194,049
Investment and other Revenues	\$1,211,890	\$1,573,815
Total Expenses	(\$3,499,273)	(\$2,847,043)
Excess Revenue Over Expenses	\$1,832,129	\$1,235,496

REVENUE SOURCES TOTAL PROGRAM SERVICES

Student Loan Interest Income	5%	Education and Service Projects	4%
Fee For Service	53%	Loans and Scholarships	14%
Contributions and Admin Grants	42%	LifeGuard [®]	22%
		PA PHP	28%
		PA NHP	32%

ANNUAL OPERATING EXPENSES

- 82 CENTS OF EVERY DOLLAR GOES TO PROGRAM SERVICES
- 11 CENTS OF EVERY DOLLAR GOES

 TO MANAGEMENT AND GENERAL ADMINISTRATION
- 7 CENTS OF EVERY DOLLAR GOES TO FUNDRAISING





DISTINGUISHED LIFETIME FELLOWS

Your generosity holds power. Thank you for your donation to The Foundation in 2024. Your gift changes lives.

Legacy Giving

Distinguished Lifetime Fellows are an elite group of donors who made provisions to advance the work of The Foundation in the areas of education, wellness and clinical excellence. Utilizing various 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.

*Deceased

Anonymous

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Dr. and Mrs. James M. Cole*

Dr. Jeanne A. Cooper*

Drs. Harold R. Cottle and Betty L. Cottle*

Drs. Jitendra M. Desai and Saryu J. Desai

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Thank you to our hospital sponsors who supported The Foundation of the Pennsylvania Medical Society and the Pennsylvania Physicians' Health Program in 2024. We are grateful for your generous support!		Independence Health System- Frick, Latrobe, Westmoreland Hospital Indiana Regional Medical Center Jefferson Abington Hospital Jefferson Regional Medical Center Main Line Hospitals Inc-	M & H M & F M & F
		Penn Highlands Du Bois	M & H
♥ Ambassador \$10,000 and Ab	ove	Thomas Jefferson University Hospital	Ν
Geisinger Medical Center	M & H	UPMC Hanover	M & H
Lehigh Valley Hospital-Cedar Crest,		UPMC McKeesport	Ν
Hazelton, Muhlenberg, Schuylkill	M & H	UPMC Memorial	M & H
Penn Medicine Chester County Hospi	ital M	UPMC St. Margaret	Ν
Penn Medicine Lancaster		Washington Health System	M & F
General Health	M & H	WellSpan Ephrata Community Hosp	ital N
UPMC Pinnacle Harrisburg	M & H	WellSpan Good Samaritan Hospital	<i>N</i>
WellSpan York Hospital	M & H	Western Pennsylvania Hospital	N
♥ Visionary \$5,000 to \$9,999		♥ Guardian \$1,000 to \$2,499	
Forbes Hospital	M & H	Allegheny Valley Hospital	Ν
Penn State Health Milton S. Hershey		Chan Soon-Shiong Medical	
Medical Center	M & H	Center at Windber	M & H
Reading Hospital Tower		Eagleville Hospital	H
Health System	M & H	Einstein Medical Center Montgomer	y M
UPMC Altoona	M & H	Einstein Medical Center Philadelphia	. N
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Evangelical Community Hospital M&H		Mercy Fitzgerald Hospital	Ν
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Medical Center	Μ		

HOSPITAL SUPPORT

♥ Guardian \$1,000 to \$2,499

♥ Partner \$100 to \$499

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Penn State Health St. Joseph	M
Titusville Area Hospital	M & H
UPMC Wellsboro	Н
Wernersville State Hospital	Μ

▼ Benefactor \$500 to \$999

Guthrie/Robert Packer Hospital	M
Millcreek Community Hospital	M & F
UPMC Muncy	M & F
UPMC Northwest-Seneca	M
UPMC Somerset	M
Wilkes-Barre General Hospital	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 2024.

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\$5,000 TO \$9,999
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\$1,000 TO \$2,499
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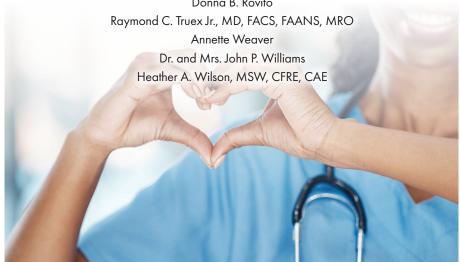


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