

# *Soaring to* New Heights



2018 | ANNUAL REPORT



# Soaring to New Heights



*Alex Bauer, Chief Financial Officer, Vicki Hazard, Vice Chair, Board of Trustees, Dr. Kurt N. Ransohoff, CEO and Chief Medical Officer, Janet A. Garufis, Chair, Board of Trustees, Stephen Jones, Vice Chair, Board of Trustees, Chad Hine, Chief Operating Officer*

# *It is with pride that we reflect on the 2018 successes of Sansum Clinic.*

The year was dedicated to developing strategies for improving health outcomes for our patients and enhancing the patient experience, while at the same time implementing a number of initiatives aimed at reducing the cost of care for our patients. We are committed to moving toward a more value-based model of care for our patients – in which the Clinic is paid based on patient health outcomes rather than the amount of healthcare services delivered – to ensure we are providing the right care, in the right setting, at the right time, and at an affordable cost.

Our ability to respond and adapt to an ever-changing healthcare environment has enabled us to change and grow to meet the needs of the community. We have expanded our use of data to directly affect medical outcomes and motivate positive change. We have harnessed the power of technology to ensure a more secure future for the organization. We continue to reach out to our neighbors in need to provide free diagnostic services and eye care, and receive national recognition for the quality of care we deliver to our patients.

As you read this report, you will learn about some of our initiatives designed to help address one of our organization's greatest challenges: long wait times for appointments. In recent years we have built the Foothill Medical & Surgical Center, Elings Eye Center, Ridley-Tree Cancer Center, and doubled the size of the Urgent Care department to expand our physical capacity. We continue our focused efforts on recruiting highly-trained physicians from world-class organizations, and introducing new programs like the Palliative Care and Advance Care Planning program.

As a nonprofit organization, Sansum Clinic reinvests earnings back into the community by continually improving care, equipment and services for our patients. Grateful patients continue to invest in Sansum Clinic because they have confidence in our ability to deliver on our promises, and we honor their investment through thoughtful use of their philanthropic gifts of support.

This report is more than the sum of its parts. It is the story of all that we do as an organization to deliver on our mission to provide an excellent healthcare experience, recognizing our first priority is the patients we serve.

**Thank you for choosing Sansum Clinic, and here's to your good health.**

Sincerely,



**Alex Bauer, EJD, MBA, CPA**  
Chief Financial Officer

**Vicki Hazard**  
Vice Chair, Board of Trustees

**Kurt N. Ransohoff, MD, FACP**  
CEO and Chief Medical Officer

**Janet A. Garufis**  
Chair, Board of Trustees

**Stephen Jones**  
Vice Chair, Board of Trustees

**Chad Hine, MBA**  
Chief Operating Officer

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# Advancements in Operations

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Medication Management for Patients with Diabetes

Foothill Surgery Center at Sansum Clinic

Operational Efficiency Task Force

Primary Care Provider Scorecards

Press Ganey Patient Experience Surveys



## Palliative Care & Advance Care Planning Program

Sansum Clinic is establishing a **Palliative Care and Advance Care Planning Program** with the goal of enhancing the quality of life for our patients who are being treated for a serious illness. The program will address the physical, emotional, social and spiritual needs by facilitating patient autonomy and access to information. The palliative care team will explore the patients understanding about their illness and prognosis and will help them clarify their treatment goals and wishes, and provide care to those who need their expertise.

The primary services will be provided within Sansum Clinic's **Ridley-Tree Cancer Center** and, over time, will also extend to patients homes, hospital, skilled nursing facilities, and other Sansum Clinic locations, following the patient wherever they may need care. Advance Care Planning would be an integral part of the program with a goal of aligning medical care with the individual patient's preferences – *“that people get the care they need and no less, and the care they want and no more”*. A social worker will be a certified ACP provider and will incorporate advance



care planning, as well as completion of advance directives, and if appropriate, POLST documentation, as part of the program.

The Palliative Care Team will thoroughly address the patients' pain and comfort care issues. They will engage patients in meaningful discussion about healthcare goals and preferences, including advance care planning and end of life goals and ensure patients have appropriate/early access to hospice and other critical patient-oriented programs as their disease progresses. They will also coordinate with primary care and other care providers who are part of the patient's medical team.

The Ridley-Tree Cancer Center cares for approximately **75% to 80%** of the oncology patients in the area. Sansum Clinic cares for a large number of pulmonary, cardiology, rheumatology and neurology patients in the community. We anticipate that approximately **60%** of the program will serve patients with cancer, and approximately **40%** of the program will serve patients with neurological conditions, such as ALS and dementia; and patients with cardiac, respiratory, kidney, liver or other organ dysfunction or failure, such as congestive heart failure, COPD or end-stage renal disease.

Evidence from multiple large clinical trials shows early palliative care improves the quality of life (enhanced pain and symptom control), reduces depression and improves satisfaction with care. For hospitalized patients, palliative care reduces the length of stay, the number and duration of ICU stays and readmission rates and emergency room use. The program increases use and length of stay in hospice. For patients near the end of life, palliative care reduces the use of invasive and aggressive treatments and increases enrollment and length of stay in hospice, while actually improving survival.

By engaging patients early in the disease course, clinic based Palliative Care services support patients, over time, in achieving maximum symptom control and

*Approximately 60% of the program will serve patients with cancer, and approximately 40% of the program will serve patients with neurological conditions such as ALS and dementia.*

# Advancements in Operations

in making informed choices about which health services they wish to utilize and in which settings.

Studies have shown that patients who receive early, clinic based palliative care often consume fewer and more appropriate health care services and indicate greater satisfaction with their care, compared to patients who receive no palliative care. The Palliative Care and Advance Care Planning Program will be a multidisciplinary program that “touches” all departments within Sansum Clinic and the Ridley-Tree Cancer Center.

The administrative oversight for the program will be provided by **Matt Kunkel, VP Operations** at Ridley-Tree Cancer. Matt was involved in setting up the Palliative Care Program at Palo Alto Medical Foundation prior to joining the Sansum Clinic team in 2016.

The clinical programmatic oversight and interdisciplinary outreach will be provided by **Dr. Marjorie Newman, Medical Director**, with input from various clinical departments within Sansum Clinic. We are currently recruiting for the Palliative Care team and anticipate the program being fully operational by October 2019.

Special thanks to our major donors the **J.S. Bower Foundation, William Williams, Natalie Orfaea Foundation and Lou Buglioli, Lady Leslie Ridley-Tree, Benjamin and Valerie Wayne, Warren and Mary Lynn Staley and Hollye and Jeff Jacobs.**



Healthcare providers at *Let's Talk: Putting Advance Care Planning into Practice*



Advance Care Planning  
at **sansum** CLINIC

## *Let's Talk: Putting Advance Care Planning into Practice*

In May, Sansum Clinic hosted a free **Advance Care Planning (ACP)** seminar in partnership with the Coalition for Compassionate Care of California (CCCC) entitled **Let's Talk: Putting Advance Care Planning into Practice** to train healthcare providers in ACP education, skills training and support. This training was designed to increase ACP knowledge, expertise and conversation skills for ACP discussions to ensure conversations occur with greater regularity and earlier in the course of a patient's care.

The audience included a mix of Sansum Clinic and community primary care physicians, specialty physicians, nurse practitioners and physician assistants, and covered ACP activities that ideally occur over the course of a person's lifetime or health trajectory, best practices for using the **Physician's Orders for Life-Sustaining Treatment (POLST)** form, specific techniques for facilitating conversations about goals of care, and how a medical practice team could approach implementing an ACP process for their patients.

The event was led by **Marjorie Newman, MD**, Medical Director of Sansum Clinic, and featured speakers **Lael C. Duncan, MD**, Medical Director of CCCC, and **Shirley Otis-Green, MSW, MA, ACSW, LCSW, OSW-C**, Clinical Director of CCCC. **Cottage Health** was the title sponsor. Participants were eligible for continuing medical education (CME) credits through the Santa Barbara County Consortium for CME, which is accredited by the Institute for Medical Quality/California Medical Association (IMQ/CMA) to provide continuing medical education for physicians.

A second event was held for social workers, hospice staff, and other healthcare professionals, to provide the tools to begin a quality Advance Care Planning experience with patients and their families, to help align patients' own goals and preferences with their medical care and treatment. This will result in a better experience for patients whose wishes will be honored, and it will also lead to



more effective and efficient use of medical resources, including reducing hospital readmissions, improving communication between different entities involved in a patient's care, and more effective use of valuable tools like POLST.

## Ongoing Advance Care Planning Services

Sansum Clinic and Ridley-Tree Cancer Center offer workshops and individual consultations for patients and families to explore values, goals, beliefs and preferences for healthcare and for assistance in completing an **Advance Directive document**.

In 2018, more than 100 patients, family members or caregivers met with Advance Care Planning Facilitator, **Rev. Laura Mancuso**, to:

- Select a qualified healthcare agent to act on their behalf
- Explore their values, goals, beliefs and preferences for healthcare
- Understand their current health status and expected course of illness
- Document the name of their healthcare agent and preferences in a My Care Advance Directive
- Complete a POLST if appropriate
- Share decisions with loved ones and healthcare providers
- Record their Advance Care Plan in the electronic health record



Patients are also referred to **Advance Care Planning** as part of our **Care Management Program**. Advance Care Planning is presented in collaboration with **Alliance for Living and Dying Well**, and this service is free of charge.

**Rev. Laura Mancuso**, Advance Care Planning Facilitator

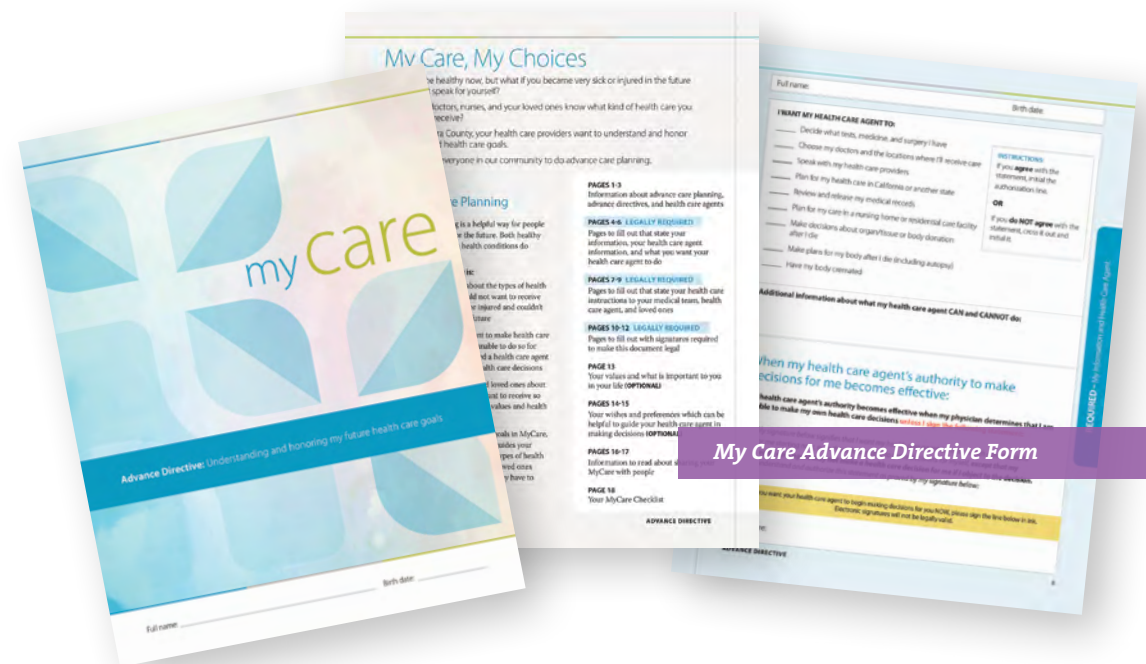


## Care Management Program

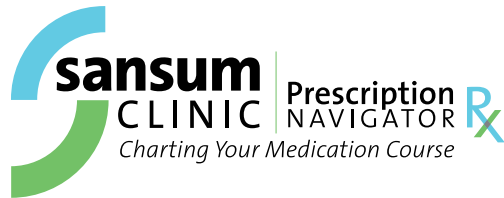
Care management ensures that care is provided to individuals as seamlessly as possible and minimizes the potential for duplication of services. In 2018, **Care Manager Christine Cruse, MSW, ASW** assisted **682 patients** in managing their health condition by helping them prioritize their healthcare needs and offering support in navigating an increasingly complex healthcare system. Patients and their family members act as “partners in care” with the Care Manager by identifying their personal goals, engaging in education, and participating in strategies to facilitate compliance.

Special attention is placed on care planning and self-care support. A self-care plan serves as a “road map” to improving health. The Care Manager shares the plan with the patient's primary care provider, and works closely with patients to:

- Incorporate preferences, and include current issues, medications and allergies.
- Connect patients with the Prescription Navigator to ensure safe and effective use of medications if applicable.
- Utilize lifestyle and treatment goals.
- Address potential barriers to meeting goals and strategies.



# Advancements in Operations



Sansum Clinic's innovative **Prescription Navigator Program** assisted **1,359 patients** in managing medications and prescriptions in 2018. This pharmacist-led medication therapy management program ensures the safe, effective, and appropriate use of medications by Sansum Clinic and Ridley-Tree Cancer Center patients.

Prescription Navigator **Rania Shenoda, PharmD**, is well trained in the therapeutic uses and effects of drugs and can help ensure appropriate medication use, reduce medication-related problems and improve health outcomes. The Prescription Navigator often works with caregivers or family members to give them a better understanding of medications they might help administer, and to guide them with setting up pill boxes for proper adherence to medication therapy. Our electronic health record system gives the Prescription Navigator the information needed to assist patients with their therapy through access to provider notes, lab work, and by communicating with providers about any concerns or recommendations.



Rania Shenoda, PharmD

*The Prescription Navigator Program is generously underwritten by Julie Nadel, and is free of charge and open to patients of Sansum Clinic and Ridley-Tree Cancer Center.*

In 2018, 122 patients self-referred to the program through the **Brown Bag Medication Review** program, which is designed for patients who take multiple medications or have any medication concerns. The pharmacist:

- Reviews all medications to ensure patients understand what has been prescribed and why
- Looks for adjustments that may increase the effectiveness of the therapy
- Screens for potential interactions or side effects
- Assures that the medication list is up to date
- Answers medication questions and discusses the risks and benefits of medications with a health professional

## Hospital and Skilled Nursing Facility Discharge Medication Review Program

For Sansum Clinic patients who are discharged from the hospital or a skilled nursing facility, the Prescription Navigator contacts the patients or family members by telephone after discharge to conduct a comprehensive medication review and ensure they have all of the necessary medications needed at home. The Prescription Navigator ensures that the patient understands their medication regimen and any changes made by the providers at the hospital or skilled nursing facility since this can be confusing for patients at home. During this post discharge telephone consultation, the Prescription Navigator updates the medication list in the Sansum Clinic electronic health record system.

*“Rania Shenoda is a wonderful addition to the medical staff at Sansum Clinic. My husband takes several medications and she has been extremely helpful in discussing various medications, dosage and their interactions. She is knowledgeable, patient, understanding and caring. She is readily accessible and always helpful. We are so very grateful for this excellent resource, especially in the person of Rania Shenoda. Another reason why we come to Sansum Clinic.”*

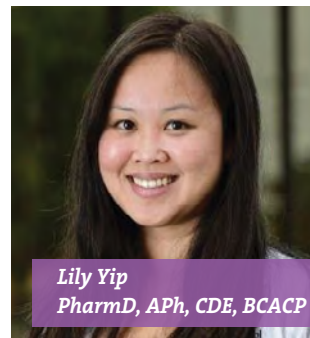
– A Grateful Patient

## Medication Management for Patients with Diabetes

**Lily Yip, PharmD, APh, CDE, BCACP**, joined Sansum Clinic in 2018 to address a critical need among diabetes patients. As a medication therapy management pharmacist, Lily cares for patients referred by Sansum's six endocrinologists and two certified physician assistants (PA-Cs). Many of these patients require more education and an increased understanding of the prescriptions they take to maintain their health. As a certified diabetes educator, Lily is familiar with the depression, anxiety and guilt these patients can experience from the stresses of managing their disease.

In free consultations at the multi-specialty clinic at 215 Pesetas Lane, Lily reviews a patient's entire medical record and takes time to uncover important factors that might not have been shared with the physician. Lily says these talks reveal barriers that prevent people from taking their medication, like insurance coverage issues, drug side effects or financial struggles affecting the purchase of healthy food. Patients may have stopped seeing their primary care doctor, missed lab tests, failed to pick up prescriptions, are confused about a physician's advice or perhaps just need a helping hand to navigate their concerns. Lily works to bridge the gap between the patient and the medical team.

Armed with a doctorate from the University of Southern California School of Pharmacy and seven years experience working around Los Angeles in similar positions, Lily can order or change prescriptions and adjust doses. She combs through patient reports to find people who may have fallen through the cracks by not adhering to the medication protocol or skipping appointments, knowing it often just takes someone reaching out personally to change the situation. Lily, who is fluent in English, Spanish or Chinese, is passionate about her work and the patients.



**Foothill Surgery Center at Sansum Clinic** is one of the preeminent surgery centers in Santa Barbara, and continues to expand its high quality services in a cost-effective and friendly setting.

The surgical team has expanded to include a facial plastic surgeon, **Dr. Andrew Beckler**, an oculoplastic surgeon, **Dr. Mica Bergman**, and a pain management specialist, **Dr. Graham Reimer**.

**In 2018, patient volumes increased between 10-30 %.** Staff turnover remains less than 1%. The rate of infection remains less than 1%. The surgery center consistently scores in the mid-90s for patient satisfaction.

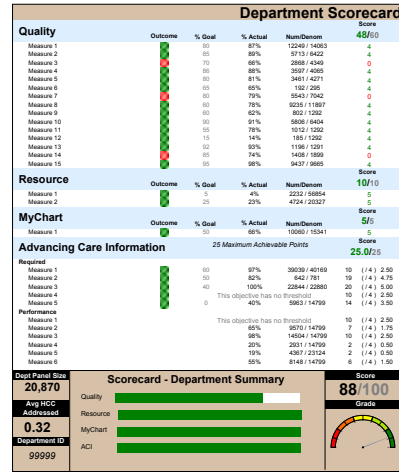
The Foothill Surgery Center was successfully reaccredited in 2017 for excellence in the delivery of care to our patients by the **Accreditation Association for Ambulatory Health Care (AAAHC)**, an accreditation body established to advance and promote patient safety. We continue to uphold the standards required for this accreditation.



# Advancements in Operations

## Primary Care Provider Scorecards

Tracking clinical quality continues to be a central focus for Sansum Clinic, particularly in our Primary Care Departments. **Quality Scorecards** in **the Wave** provide real-time information regarding progress toward clinical quality goals. The data are easily visualized at the provider, department, service line, and overall Clinic level. These reports promote partnership between care team members, clearly indicating opportunities for population outreach, education, or individual patient services. Being able to quickly realize these opportunities on the Scorecard enhances communication across the care team, promotes streamlined workflows, and enables the patient to remain at the focus of the care team while simultaneously ensuring the quality goals of the Clinic are met. Additionally, the scorecards provide a concise way for executive leadership to monitor the Clinic's quality performance and make data-driven operational decisions designed to achieve performance goals.



## Press Ganey Patient Experience Surveys

Sansum Clinic has continued to partner with the research firm **Press Ganey**, a recognized leader in improving the patient experience, to listen to the feedback of our stakeholders, learn from that input, and lead targeted improvement to deliver exceptional patient experiences.

We have seen continuous improvement in our Press Ganey scores and the survey has helped us bring the 'patient voice' into our decision making process. The Executive Team reviews patient comments and uses the feedback to help focus our process improvement efforts. By putting the patient first, we not only improve the patient experience, but also consistently demonstrate high-performance across an array of metrics and measures.

The survey demonstrated that one of the Clinic's biggest opportunities in 2018 was to inform patients about delays, so each clinical site engaged their teams to develop an improved process to ensure we are consistently providing this information to patients throughout every step of their visit.

The five foundational components Sansum Clinic is focusing on to deliver efficient and effective care to patients are:

- Engaged and passionate leadership
- Safe, patient and family focused care
- Compassionate, competent caregivers
- Aligned stakeholders
- Reliable care and business process



In order to successfully deliver on the promise of safe, high-quality, patient-centered care, health care organizations like Sansum Clinic are being challenged to raise performance across all of these attributes simultaneously.

Our partnership with Press Ganey has offered Sansum Clinic access to the industry's largest healthcare performance databases — including comparative customer feedback, actionable survey data and improvement resources — to help drive targeted performance improvement.

## Operational Efficiency Task Force

Keeping trend with recent years, 2018 was a time of continued change within the healthcare landscape. We are focused on continuous improvement of all that we do, so we must adapt our delivery system to meet the needs of our patients while ensuring a sustainable future for the organization.

The Sansum Clinic Executive Team – in partnership with the Board of Trustees – initiated a dedicated effort to identify actions that would ensure a successful 2018, while also implementing the continuous improvement framework that will help to secure decades of future success. This Task Force continues to work with management and physician leadership with a goal of operating as efficiently and effectively as possible and this will require ongoing dedication from all members of the Sansum Clinic team.

Some outcomes of this work include more actively helping to manage internal referrals to ensure patients receive the care recommended by their Sansum primary care providers, and working with payors to help ensure our successful participation in population health management programs. This work led to expansion of our Urgent Care hours and implementation of a new two-way texting technology for patients and their care teams.

We look forward to ongoing improvement work that will help us continue to meet the needs of our patients, now and well into the future.

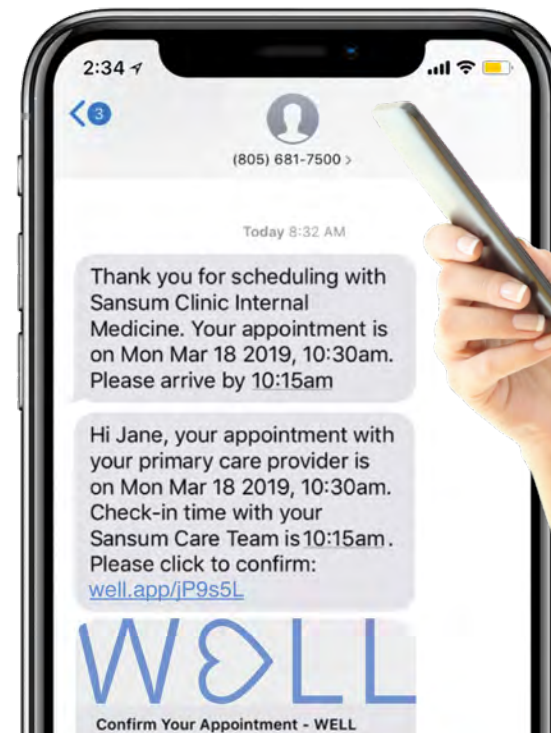
### EXPANDED URGENT CARE HOURS

Sansum Clinic **expanded Urgent Care hours to 8:00 am to 7:00 pm every day of the week**, to better serve our patients with access to convenient medical care for urgent needs that don't require a visit to the emergency department. In 2018, **41,222** individual patients visited Urgent Care for **56,531** visits.

### WELL AT SANSUM CLINIC

We introduced **WELL at Sansum Clinic** – our newest communication tool that connects patients to Sansum Clinic via two-way text messaging. We are now able to stay in touch with patients to confirm, cancel or reschedule appointments, enabling patients to communicate with us about appointments more efficiently and at their convenience. Patients are automatically enrolled with this secure communications tool.

WELL  
at **sansum** CLINIC



# 2

# New Technology

EPIC Revenue Cycle

Business Continuity and Disaster Recovery

Data Warehouse and Analytics

Rheumatology Ultrasound Expansion

Radiology Equipment Upgrade

Health Records on iPhone





## EPIC Revenue Cycle

In 2011, Sansum Clinic implemented a state-of-the-art **Electronic Health Record System**, which we call **the Wave**, based on software from **Epic Systems**. We have worked diligently to improve on the platform and we are thrilled to be recognized as one of the most technically advanced organizations in the nation. This success provided the platform for us to carefully consider what else we could do to improve our technical abilities for our providers, our management and our patients. Over the next year, Sansum Clinic will be implementing new software from Epic which is designed to improve registration, scheduling, billing and patient engagement. We are excited about the opportunities this will afford our revenue cycle operations, and how these new tools will improve the patient experience. We currently have over **91,000 patients** using **MyChart**. With our new set of tools, patients will be able to schedule appointments online, ask to be notified of cancellations, pay their bills online (or request a payment plan) and request estimates for services. These are just a few of the enhanced services we will be able to offer. All of this helps build a robust platform for future opportunities to provide our providers, staff and patients with the best tools on the market.

## Business Continuity and Disaster Recovery

Given Sansum's increasing dependency on information technology to run operations, the IT Department received full board approval for a **Business Continuity and Disaster Recovery** program to limit risk and ensure continuity of patient care in the event of an unexpected interruption.

Sansum had outgrown its existing data center and the new program, which utilizes the premier vendor of hosted data services, will include hardware, the virtual environment and circuit installation with bidirectional data circuits. It will also provide increased disaster recovery protection because it is based outside of our region. The first systems to go live in 2019 in the new data center will be the electronic health record system, the Wave, including secondary failover hardware for the Wave. The Clinic's revenue cycle system is slated to go-live in early 2020.

## Data Warehouse and Analytics

Sansum's **Data Warehouse** came to the forefront of clinic operations in 2018, becoming the data source for combined financial and clinical reporting. This was a crucial step towards ensuring we meet the ever increasing challenges in the healthcare landscape. Payers grade us on our ability to deliver value-based care. This means payers expect our quality of care to be high and delivery of healthcare services to be as efficient as possible in terms of cost and utilization. To meet both aspects of the value-based care challenge, it is imperative that we have clear, near real-time visibility into our clinical quality performance as well as the resource utilization and access dimensions associated with delivering high-quality services to different patient populations. Within specific patient populations, reporting from the Data Warehouse can demonstrate visit and access statistics, utilization of preventive services, clinical quality performance, payer reimbursement, in addition to many other details within the Value-Based Care framework. Having access to this combined information supports our leadership in making timely decisions to stay on track towards meeting our goals.

## Rheumatology Ultrasound Expansion

The **Rheumatology Department** expanded services in Solvang by adding ultrasound technology that ensures Sansum Clinic is able to provide the same level of Rheumatology service everywhere it is offered.



## Health Records on iPhone

Sansum Clinic collaborated with Apple on a new health records feature in the iPhone Health app. **Health Records on iPhone**, brings together hospitals, clinics and the existing Apple Health app to provide our patients who are active on **MyChart** with access to their records in the Apple Health app, so they can view their own personal health data from all participating health institutions in one place. Sansum Clinic has more than 91,000 patients using MyChart, and this new feature will be available to all of those who use iPhones and receive care at any of our 22 patient care facilities.

Previously, patients' medical records were stored in multiple locations, requiring patients to log into each care provider's website and piece together the information manually. Apple worked with the healthcare community to take a consumer friendly approach and created Health Records based on FHIR (Fast Healthcare Interoperability Resources), a standard for transferring electronic medical records.

Now, patients will have medical information from participating institutions

organized into one view, covering allergies, conditions, immunizations, lab results, medications, procedures and vitals, and will receive notifications when their data is updated. Health Records data is encrypted and protected with the user's iPhone passcode, Touch ID or Face ID.

## Radiology Equipment Upgrade

The Sansum Clinic **Radiology Department** completed an ambitious technology upgrade by converting from computed radiography to digital radiography clinic-wide. The conversion allowed us to meet the **Consolidate Appropriations Act of 2016**, which incentivizes organizations to transition from computed radiography to digital radiography. Digital radiography technology benefits patients with state of the art imaging equipment and a decrease in radiation dose in general radiology by more than 35%. The new technology also offers an increase in efficiency. It used to take about five minutes to complete a routine chest x-ray with computed radiography equipment. Digital radiography allows for the same exam to be completed within one minute, which enables us to provide services to more patients in a shorter amount of time.

*Health Records on iPhone, brings together hospitals, clinics and the existing Apple Health app to provide our patients who are active on MyChart with access to their records in the Apple Health app.*





*It used to take about five minutes to complete a routine chest x-ray with computed radiography equipment. Digital radiography allows for the same exam to be completed within one minute, which enables us to provide services to more patients in a more efficient manner.*



# 3

# Culture of Collaboration

## WE CARE

Coastal One Health Partners

Ridley-Tree Cancer Center  
at Sansum Clinic

Sansum Clinic in the Community

Santa Barbara Neighborhood Clinics

SEE International

Doctors Without Walls/Santa Barbara  
Street Medicine

Other Partnerships



## WE CARE

At Sansum Clinic, our patient-centered culture is the intersection of who we are and what we do. As a healthcare organization, we provide *health* and we provide *care* – making sure that our patients and colleagues feel well cared for. In October 2018 the Executive Team introduced a new communications philosophy called **WE CARE** to provide staff and physicians with tools to help us all care for our patients in a way that carries them along their best possible health journey. Initial WE CARE training was centered on the kinds of behaviors and interactions we are hoping will become even more integral to how we conduct business and patient care.

WE CARE is a simple acronym that represents our pledge to serve, communicate and care wholeheartedly with every encounter with a patient or colleague.

During the Clinic's inaugural WE CARE Month, more than **850 staff** attended one of **19 WE CARE training sessions** at the Wolf Education and Training Center at Ridley-Tree Cancer Center at Sansum Clinic. **Seventy-four staff** were recognized as WE CARE Champions for embodying the Sansum Clinic mission, vision and values. Survey data showed that staff were thrilled to have an opportunity to enhance their customer service and patient experience skills. WE CARE has been incorporated into all job descriptions and our employee evaluation tool. Many staff report that the WE CARE philosophy has become a standard part of their daily work throughout the Clinic with patients and colleagues alike.

- W**ELCOME *warmly and sincerely*
- E**NGAGE *wholeheartedly*
- C**OMMUNICATE *the plan*
- A**SK *questions to deepen understanding*
- R**EASURE *best interests are in mind*
- E**XIT *with appreciation and thanks*



## Coastal One Health Partners

**Coastal One Health Partners (COHP)** is a **Track 1+** accountable care organization (ACO), formed in 2018

between Sansum Clinic and Cottage Hospital to enhance the care and services provided to the fee for service Medicare population. COHP has successfully completed the first year of a three year program. The success of the ACO, as measured by Centers for Medicare and Medicaid Services (CMS), depends upon how effectively we are meeting the “triple aim” of healthcare, defined as providing high quality care, an excellent patient experience and appropriate resource utilization (e.g., the right care, at the right time, in the right setting).

For the first year of performance, CMS requires that the ACO is able to successfully report on all of the metrics that are being evaluated by CMS, such as clinical quality measurements and patient experience surveys. In subsequent years, not only will the ACO need to successfully report on all of the metrics but will also need to demonstrate year over year improvement on the clinical quality and patient experience metrics and performance will be compared against other ACO's nationwide. In addition, CMS evaluates appropriate resource utilization by monitoring the Medicare claims of the attributed membership to determine if care is being provided in the most appropriate and cost effective setting. Performance to date demonstrates that our ACO performs in the top quartile nationally on clinical quality and resource use metrics with significantly lower unplanned hospital admissions, and lower hospital and skilled nursing facility re-admission rates.

One of the great benefits of the ACO is the collaboration that has resulted as part of the COHP work groups, which crosses the continuum of care from in-patient to out-patient and skilled nursing facility. By getting everyone around the table we have been able to identify issues that impact the care of our collective patients and make improvements that we believe will translate into the triple aim of healthcare.



*During the Clinic's inaugural WE CARE Month, more than 850 staff attended one of 19 WE CARE training sessions at the Wolf Education and Training Center at Ridley-Tree Cancer Center at Sansum Clinic*



*Teresa Arellanes, Sandie Kleidosty, Wally Reddie, Irving Robinson and Dennis Hartman from the Purchasing Department at the Clinic's inaugural WE CARE Month training session at the Wolf Educational and Training Center at Ridley-Tree Cancer Center at Sansum Clinic.*

# Ridley-Tree Cancer Center at Sansum Clinic

The Ridley-Tree Cancer Center has been at the forefront of comprehensive outpatient cancer care in the Santa Barbara area for over **70 years**. We have the expertise and technology of an academic cancer center complemented by a personalized approach to care.

Ridley-Tree Cancer Center's highly trained and devoted physicians and staff integrate the latest technology and treatment protocols with supportive care programs to provide patients with every opportunity for successful treatment, recovery and a healthy return to the activities that enrich life.

## OUR PROGRAMS INCLUDE:

- The latest Medical Oncology and Hematology treatment with on-site patient participation in national clinical trials.
- The most technologically advanced Radiation Oncology and Nuclear Medicine departments for precisely targeting and treating cancer.
- A Surgical Oncology department based at the Ridley-Tree Cancer Center for outpatient care, and at Cottage Hospital for inpatient care.
- Patient Navigation, Genetic Counseling and Oncology Nutrition programs to meet the multi-layered needs of our patients.
- Oncology Social Work services to help patients with psychological, social and financial stresses. This includes: individual and family counseling, case

management, support groups, assistance with home care and long-term care, insurance, transportation, finances and advocacy.

- Wellness programs and classes offering a wide range of activities to provide a healing and supportive atmosphere for patients and caregivers. Programs include: yoga, painting, flower arranging, exercise programs, meditation, music therapy, and more.
- A Resource Library with print and electronic education and resource materials for patients, their families and community members seeking information on cancer.
- Community Outreach and Prevention Programs to reduce cancer risk among patients in our community.

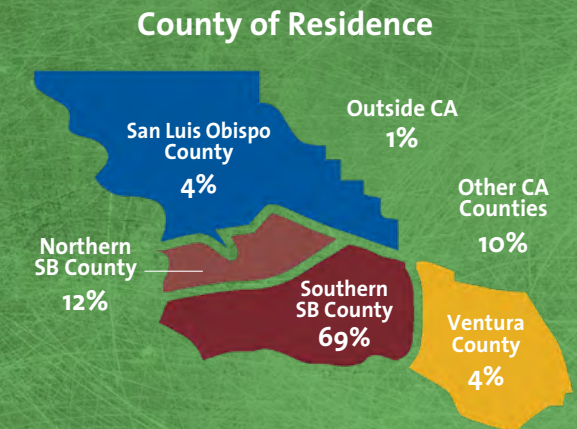
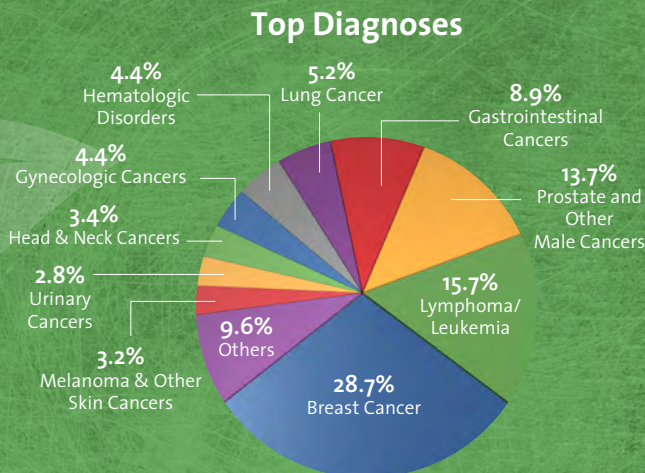


## Patients at a Glance

**12,552** Unique cancer patients treated

**79,673** Visits to our oncology departments

**68** Average age of patients





## Ridley-Tree Cancer Center

### RTCC 2018 Highlights

Treated the **first Radiation Oncology patient at 540 W. Pueblo Street** in February. The department was fully operational with all modalities of treatment by September 14, 2018, when Ridley-Tree Cancer Center became the only facility located in Central California with two Elekta Versa HD linear accelerators, delivering the full spectrum of radiotherapy techniques.

Welcomed Director of Surgical Oncology, **William Charles Conway, MD**, who established the Gastrointestinal (GI) Surgical Oncology Program, which was recognized by Leapfrog Group as meeting the requirements of a high-volume pancreatic surgery center in year one.

Established **partnership between Nuclear Medicine and Cottage Hospital Radiology** to bring **Y-90 Therasphere therapy** to our patients for treatment of liver tumors, using radioactive glass beads that are inserted through a catheter to the tumor area releasing the treatment to just the area of the tumor.

Recruited **Julian Davis, MD, Andrea Kreamsreiter, PA-C and Erica Koeppen, DNP** to the Medical Oncology department.

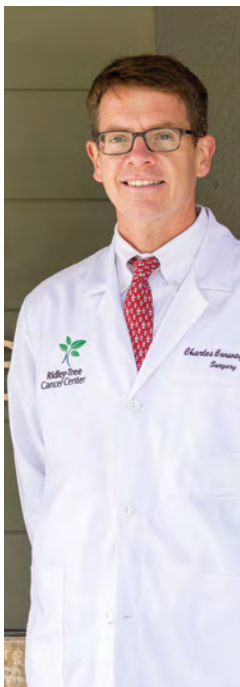
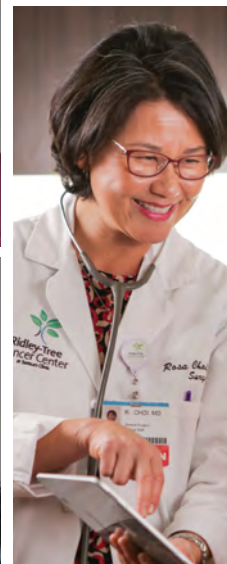
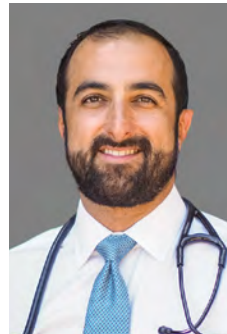
Breast cancer surgeon **Rosa Choi, MD, FACS**, moved her practice to Ridley-Tree Cancer Center in 2018, marking the first time Santa Barbara had a multi-disciplinary Breast Cancer Program under one roof, including surgery, medical oncology, radiation oncology and a robust offering of clinical and supportive care services.

Celebrated the opening of the **Wolf Education & Training Center** in June 2018 and hosted our first public lecture, **Cancer Prevention: From Research to Public Benefit with Peter Greenwald, MD, DrPH** that attracted over 80 members of the community.

Launched the **Genetic Counseling Cancer Prevention Project**, producing four educational videos and an online advertising campaign to educate the community regarding genetic risk factors, enhancing community partnerships and solidifying genetic counseling guidelines for healthcare providers.

Oncology Social Work Program Manager, **Mary Solis, MSW, LCSW** retired after 34 years of service at the Cancer Center. Mary developed the Social Work department into what it is today, employing a staff of 7 and providing emotional, financial and practical support for thousands of patients each year.

Enhanced our Supportive Care patient offerings with the addition of new **Library, Wellness and Music Therapy programs** including: **Moving Pictures** in partnership with the Santa Barbara International Film Festival; **Book Club** in partnership with the Santa Barbara Public Library, **Advanced Care Planning Workshops, Meditation for Cancer Survivors, Oncology Wellness Lecture, Singing Group and Drumming Circle.**



## Sansum Clinic in the Community

Sansum Clinic strives to provide quality patient care and high standards for the communities we serve. We have a long standing commitment to meet the needs of the low income, uninsured, and underinsured patients in our community through our Charity Care Program. We have a policy that provides guidelines for identifying patients who may qualify for assistance and also establishes the financial screening criteria with an objective of providing care regardless of a patient's ability to pay.

In our commitment to provide 'good health for everyone' we offer flu shots through our community-wide Flu Shot Program conducted every fall and winter. Annual seasonal flu vaccines are the best way to reduce the chances that individuals will get seasonal flu and spread it to others. When more people get vaccinated against the flu, less flu can spread, resulting in better health and well-being for the residents of our community.



Sansum Clinic is proud to partner with the Santa Barbara Neighborhood Clinics (SBNC) providing them with free diagnostic services for their patients who have no health insurance. This type of partnership is rarely available to safety net providers elsewhere in the country.

SBNC is an independent, nonprofit healthcare organization dedicated to providing high quality, affordable, medical, behavioral health and dental care to those in need in Santa Barbara County, regardless of one's ability to pay.

SBNC serves 1 in 10 people in the community. Over 22,000 patients are cared for at four medical clinics, two dental clinics and three intermittent clinics.

Since 2010 Sansum Clinic has provided **5,554 SBNC patients** with **6,782 diagnostic services** totaling over **\$2.8 million**. The cardiology diagnostic services include

echocardiogram and cardiovascular device monitoring and other diagnostic services such as general and special radiology, MRI scans, CT scans, low-dose CT, ultrasounds and mammograms.

In 2019 the Clinic reinstated the colonoscopy screening program at SBNC in partnership with the Cancer Foundation of Santa Barbara.



In 2018 Sansum Clinic partnered with **Santa Barbara Vision Care (SBVC)**, a local health program that serves as part of SEE International's domestic programs to host the annual Veterans Day Vision Clinic. Six Sansum Clinic physicians performed eye exams to **56 in-need patients** at the Clinic's **Elings Eye Center**. Vouchers for free eye glasses were provided to **43 people** from Goleta Valley Optical and Blue Planet Eyewear donated sunglasses to patients.

In 2019 Sansum Clinic established a new program to provide eye care services, at no cost, to patients of SEE International who have no health insurance. This new program will replace the annual Veterans Day Vision Clinic.



Elings Eye Center

## Doctors Without Walls/Santa Barbara Street Medicine

This nonprofit organization’s mission is to provide free, volunteer medical care for the most vulnerable underserved community members of Santa Barbara County.

**Doctors Without Walls / Santa Barbara Street Medicine (DWW-SBSM)** has worked to overcome barriers to care that often inhibits people from accessing services by going to where the care is needed such as community parks. Education and training is provided to DWW-SBSM volunteers in order to promote the practice of humanitarian medicine.

The volunteers are able to meet, serve, and build trust while providing medical care. DWW-SBSM is able to fulfill their mission thanks to the partnership with Sansum Clinic. Sansum’s physicians and medical staff volunteer their time which allows DWW-SBSM to expand their reach within the community.

In 2018, DWW-SBSM provided medical care to approximately **1,300 underserved residents** in the community.

We would like to acknowledge the Sansum Clinic physicians and medical staff who graciously volunteer their time to DWW-SBSM:

- |                            |                                |
|----------------------------|--------------------------------|
| Laurel Bliss, MD           | Liberty Partridge, MD          |
| Fred Kass, MD              | Dave Phreaner, MD              |
| Kati Kenner, PA            | Laura Polito, MD               |
| Aaron Lewis                | Berenice Ruvalcaba, Translator |
| Lynn Matis, LMFT (retired) | Bret Simon, OD                 |
| Ashley McGrogan, PA-C      | John Vallee, MD (retired)      |

## Additional Partnerships for Success

Sansum Clinic donated a phone system to Santa Barbara Museum of Natural History and a cystoscope to the Santa Barbara County Public Health Department.

In meeting with our guidelines to support local health related causes and organizations we participated in the following events:

**American Cancer Society Riviera Ball**

**American Heart Association’s Heart Ball and Go Red for Women Luncheon**

**Alzheimer’s Walk (Honorary Chair, Dr. Marjorie Newman, Medical Director)**

**Walk to Cure Arthritis**

**Cottage Health’s Tiara Ball**

**Edible Santa Barbara and Santa Barbara Farmers Market Cooking Demonstrations**

**Giveapalooza**

**Hospice of Santa Barbara “Five Invitations” Workshop**

**Jodi House Walk & Roll**

**Mental Wellness Center Giving Luncheon**

**Open Streets of Santa Barbara**

**Pacific Coast Business Times Healthcare Champions**

**Santa Barbara Neighborhood Clinic’s Healthcare Heroes**

**Santa Barbara Street Medicine/Doctors Without Walls**

**San Marcos High School’s Kids Helping Kids (Jar of Dreams Fund)**

**SEE International’s Celebration of Sight**







# 4

# Education & Outreach

2018 Health Education Annual Report  
Additional Activities and Accomplishments



# 2018 Health Education Annual Report

The Health Education Department improves the quality of life of patients and the community by encouraging healthy choices, assisting in the management of ongoing health conditions and providing support and information for serious illness. Additionally, Health Education facilitates the physicians' ability to provide quality care by delivering the education and support component and provides a significant community service, offering many programs that are open to the community and free of charge or offered for a nominal fee. The work of the Health Education Department supports initiatives such as **Patient Centered Medical Home, Pay for Performance, Physician Quality Reporting System** and **Population Health Management**.

## SERVICES PROVIDED

In 2018 the Health Education Department provided services to approximately **9,500 people** as follows:

- **Individual professional consultations** were provided in the areas of advance care planning, care management, diabetes and nutrition to **4,900 people**.
- **Group education and support programs** were provided in **19 topic areas to 2,100 participants**.
- **Health Resource Center** provided information to approximately **1,500 people**. Popular topics requested by visitors include **Sansum Clinic Services** and **Advance Directive assistance**.
- **Community-based health events** provided resources to **1,000 people**.
- **Staff volunteered 100 hours** to community health improvement committees and events.

## Health Education Group Programs

Advance Directives Workshop  
Back Wellness  
Balance & Mobility  
Bariatric Pre-Operative Diet  
Bariatric Surgery Orientation  
Bariatric Surgery Support Group  
Camp Wheez, Day Camp for Children with Asthma  
Diabetes & Pre-Diabetes Basics  
Gestational Diabetes  
Healthy Eating Healthy Living - for kids! - NEW  
Neck & Posture Wellness  
New to Medicare and Medicare Open Enrollment  
Nutrition for a Healthy Heart  
Nutrition Navigator  
Stress Management  
Understanding Dementia  
Using MyChart - NEW  
WomenHeart Support Group  
Your Healthy Pregnancy  
Yoga 101 - NEW

## Other Health Education Services

Advance Care Planning  
Care Manager  
Diabetes Education  
Health Resource Center  
Healthy People Healthy Trails  
Nutrition Services

## Instructors, Presenters, Facilitators & Leaders

Alliance for Living and Dying Well  
Alzheimer's Association  
Christina Archer, MS, RDN  
Diana Bullock, RN, CDE  
Jinny Chang, MD  
Elizabeth Coker, PT  
Catherine Cordero, PNP  
Christine Cruse, MSW  
Cottage Health Respiratory Therapy Dept  
Lillie Donner, PT  
Gerri French, MS, RDN, CDE  
Abby Galler, RN  
HICAP (Health Insurance Counseling and Advocacy Program)  
Sheryl King, PT  
Myron Liebhaber, MD  
Laura Mancuso, MS, CRC  
Marilyn Mendoza, MD  
Suzanne Michaud, MPH  
Sheila Millington  
Luciana Mitzkun-Weston  
Anu Sharma, MD  
Herm Trabbic  
Amy VanHarn, MS, RN, CDE  
Ariadne Weaver  
Joe Wheatley  
Jay Winner, MD  
WomenHeart  
Lorraine Woodwark  
Marc Zerey, MD



Advance Directive Workshop



Back & Neck Posture Wellness



Balance & Mobility Training



Bariatric Surgery Orientation Seminar



Bariatric Surgery Support Group



Understanding Dementia



Diabetes Basics



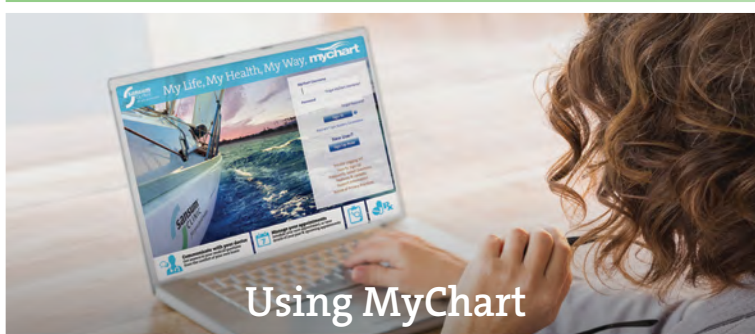
Camp Wheez



Health Eating Active Living – Kids



New to Medicare



Using MyChart



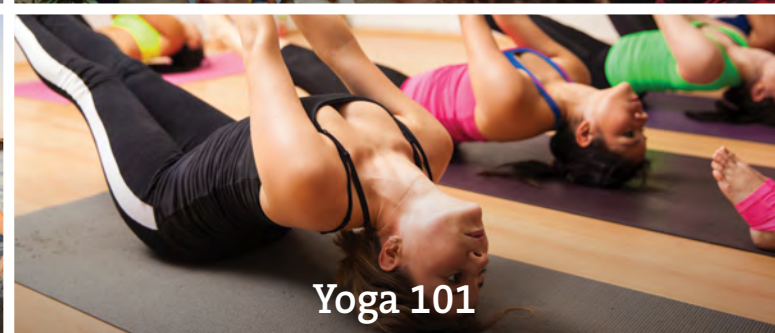
Nutrition Navigator



Stress Management



WomenHeart



Yoga 101

## Additional Activities and Accomplishments:

- **Provided leadership to Healthy People Healthy Trails**, a collaborative to bring prescriptions for outdoor activity to Santa Barbara County and to motivate walking for health. The prescription was utilized by 14 Sansum Clinic providers.
- Celebrated the **40th anniversary of Camp Wheez** under the leadership of Dr. Myron Liebhaber. Highlights included stories from former campers and staff, proclamations from Senator Hannah-Beth Jackson and the City of Santa Barbara, a touching video about Camp Wheez and a terrific anniversary party!
- Received generous support from foundations and individuals which allowed Sansum Clinic to continue to offer Camp Wheez free of charge to any child age 6 to 13 with asthma. Contributors in 2018 included **Mr. and Mrs. Jeffrey Clark; Jim and Peggie Cox; Robert Fry, MD; Gail M. Grant; Karen Johnson, MD; Ernest Kolendrianos, MD; Myron Liebhaber, MD; John Motola, PT; Geary and Tina Olivera; Deborah L. Reber; Michael and Rania Shenoda; the Swanton Foundation** and many gifts from individuals. Community partners included **Andrea Ruth, MD; Anu Sharma, MD; Catherine Cordero, PHP; CenCal Health; Cottage Health; Easy Lift; Foodbank of Santa Barbara County; Marilyn Mendoza, MD; Santa Barbara Boys & Girls Club; Santa Barbara Neighborhood Clinics; Veronica Springs Church** as well as students from our **local high schools**.
- Maintained recognition for **Diabetes Self-Management Education** from the American Diabetes Association.
- Maintained a high program satisfaction rate as indicated by program participants giving an **average score of 4.8 on a scale of 1 to 5**.
- Received **program fee donations totaled \$4,300**.
- Partnered with **Alliance for Living and Dying Well, Alzheimer's Association, HICAP (Health Insurance Counseling and Advocacy Program)** and **WomenHeart** to enhance program offerings.

- Participated in community based health activities and committees including **Adult and Aging Network; American Heart Association Go Red Luncheon and Heart Walk; COAST (Coalition for Sustainable Transportation); Healthy Lompoc Coalition; Healthy People Healthy Trails; Lompoc Senior Expo** and **Santa Barbara Senior Expo**.



Healthy People Healthy Trails

# 5

# Awards & Recognition

Patient-Centered Medical Home Recognition

Institute for Medical Quality Accreditation

EPIC Electronic Health Record Recognition

Santa Barbara Beautiful President's Award

Champions in Health Care

Reader's Choice Awards

Camp Wheez Celebrates 40th Anniversary

ASGE Recognition

Sansum Clinic in Washington, DC

McNamara Fund for Professional Enrichment and Education and Nursing Scholarship Program

Dr. Erno S. Daniel Legacy Award



## Medicare Advantage Stars for High Performance



Sansum Clinic was recognized for providing **high quality care to Medicare Advantage** patients by the Integrated Healthcare Association (IHA), a statewide nonprofit group committed to high-value, integrated care that improves quality and affordability for patients across California and the nation. Each year, IHA recognizes physician organizations that achieve a 4.5- or 5-star rating. Sansum Clinic attained a **4.5 star rating out of a possible 5 stars for 2017-18**.

Building on the Medicare Advantage (MA) star rating system for health plans, IHA uses a subset of 13 clinical quality measures to collect performance data and assign star ratings to 186 physician organizations based on how well they provided recommended care to more than 2 million California seniors and people with disabilities enrolled in MA health maintenance organizations (HMOs).

Clinical quality measures used to calculate the star ratings range from rates of breast and colorectal cancer screenings to eye exams and blood sugar control for patients with diabetes to managing osteoporosis in women with a previous fracture.

Collecting these measures at the physician organization level allows IHA to combine data from the six participating health plans to identify performance variations that can help plans and physician organizations target quality improvement efforts.

## APG Elite Status



Sansum Clinic was recognized for the fifth consecutive year for its achievement of Elite status for the **2018 APG Standards of Excellence™** survey. America's Physician Groups (APG) is the largest association in the country representing physician organizations practicing capitated, coordinated care. Each year, APG assesses tools and processes its members have in place to meet escalating expectations of healthcare purchasers and patients.

The annual **Standards of Excellence™ (SOE)** survey requires its participating members to report data across six rigorous category domains: Care Management, Information Technology, Accountability and Transparency, Patient Centered Care, and Group Support of Advanced Primary Care and Administrative and Financial Capability.

Sansum Clinic is in the company of world-class institutions like Cedars-Sinai Medical Group, Scripps Physicians Medical Group, Sutter Medical Foundation – Sutter Health and UCLA Medical Group that have also been recognized with Elite status.

## Target: BP Recognition



Sansum Clinic was recognized by the **American Heart Association (AHA)** and **American Medical Association (AMA)**'s **Target: BP Recognition Program** as one of 300 medical practices in the nation for its commitment to reducing the number of patients who have heart attacks and strokes each year.

The Target: BP program is aimed at addressing the growing burden of high blood pressure in the U.S. Of the 103 million Americans with high blood pressure, only about



*Angela Miller-Bevan (AHA), Dr. Kurt Ransohoff, Dr. Taylor Holve, Renee Grubb (Board Chair, AHA), Dr. Marjorie Newman, Barbara Conviser, Sean Johnson*

# Awards & Recognition

half of them have it controlled to a healthy level despite the fact that high blood pressure can often be managed effectively when patients work with their physician to create and follow a treatment plan. No single risk factor has more impact on the nation's death rates from cardiovascular disease than blood pressure.

This achievement is a credit to many physicians and staff within the organization. Primary care providers, nephrologists and cardiologists work directly with patients who are managing BPs in our patients, while the Sonar Clinical Quality Team extracts the data from the electronic health record. Sansum Clinic is proud to be recognized as a leader in helping reduce the devastating impact of high blood pressure in terms of heart disease and stroke for patients in our community.

## Patient-Centered Medical Home Recognition



In 2017 Sansum Clinic earned three-year recognition for all seven primary care departments from the **National Committee for Quality Assurance (NCQA)** for the successful redesign of our primary care services into the **Patient-Centered Medical Home** model of care. In this model, all aspects of patient care are coordinated through the primary care physician who leads a clinical care team that ensures patient needs are met, whether preventive, chronic or acute, and that this care is delivered in the right place, at the right time, and in the manner that best suits the patient's needs. We continue to follow all of the NCQA standards required for this recognition.

## Institute for Medical Quality Accreditation



Sansum Clinic is in its third three-year accreditation by the **Institute for Medical Quality**, an independent, not-for-profit organization, which evaluates medical groups on ambulatory care standards that have been developed by physicians with special expertise in a wide range of ambulatory care settings. The standards are specific to the California practice setting reflecting current medical practice techniques, statutes governing the operation of ambulatory care facilities and regulations adopted by the Medical Board of California.

## EPIC Electronic Health Record Recognition

Sansum Clinic was recognized as a 9-Star organization for **Epic's "Gold Stars" program**, which recognizes organizations that have taken steps to adopt new features and workflows redesigned to improve system use (staff, providers and patients). This places Sansum Clinic in the ranks of **the top 2%** of all Epic customers!

## Ridley-Tree Cancer Center Receives Santa Barbara Beautiful President's Award

Each year, Santa Barbara Beautiful recognizes important beautification projects throughout the city through its Annual Awards program. Leadership of the **Ridley-Tree Cancer Center at Sansum Clinic, Lady Leslie Ridley-Tree, Cancer Foundation of Santa Barbara, G.L. Bruno Associates, Cearnal Collective LLP**, and other key partners were recognized with the President's Award at a reception at the Music Academy of the West in September.

## Champions in Health Care



**Drs. Joseph Aragon and Michael Shenoda** were recognized by the **Pacific Coast Business Times** as **Champions in Health Care "Champion Specialists"**. Along with their colleagues in the Cardiology Department, these two doctors have brought new and innovative procedures in the field of structural heart disease for the benefit of patients in our community and throughout the central coast.



*Drs. Michael Shenoda and Joseph Aragon*





*Sansum Clinic Leadership Council*

# Awards & Recognition

## Reader's Choice Awards

Sansum Clinic had a strong showing in the 2018 *Santa Barbara News-Press Reader's Choice Awards*.

**Dr. Saida Hamdani** was voted *Best Pediatrician*, with **Dr. Dan Brennan** voted as runner up in this category; **Dr. Nina Katsev** was voted *Best Optometrist*, and **Dr. Doug Katsev** was voted *Best LASIK surgeon*. **Dr. Andrew Mester** was runner up for *Best Ear, Nose & Throat Doctor*. **Dr. David Phreaner** was runner up for *Best Family Doctor*. **Sansum Clinic** was recognized as *Best Medical Facility*.

## Camp Wheez Celebrates 40th Anniversary

Sansum Clinic and **Dr. Myron Liebhaber** celebrated **40 years of Camp Wheez**, our free day camp for children with asthma that takes place the first week in August every year. This is a tremendous milestone that has had a positive impact on hundreds of our littlest patients.

A crowd of **more than 200** enjoyed a delicious lunch, festive balloons and colorful cakes at the 40th anniversary Camp Wheez alumni reunion in August at Veronica Springs Church. Emcee, **Vicki Hazard**, Vice Chair of the Sansum Clinic Board of

Trustees, recounted the value of Camp Wheez to the **more than 1,000** kids over its history. District Representative for Senator Hannah-Beth Jackson, **Brad Hudson** presented Dr. Myron Liebhaber with a State Senate Resolution honoring his work with Camp Wheez and his contributions to pediatric pulmonary medicine and **Margaret Weiss** and **Dr. Jinny Chang** accepted a certificate of State Recognition of Camp Wheez's 40 years of service to the community.

Local firefighter **Tim Wright** expressed his gratitude for Camp Wheez on behalf of the many early camp organizers, counselors and campers in attendance.

## ASGE Recognition

The **Gastroenterology Department's Pueblo ASC** received recognition by the **American Society for Gastrointestinal Endoscopy (ASGE)**, the leading gastrointestinal medical society, for demonstrating a commitment to patient safety and quality.

## Sansum Clinic in Washington, DC

Sansum had a seat on the national stage when **Dr. Kurt Ransohoff** represented **America's Physician Groups** and **Sansum Clinic** in a Senate hearing before the **U.S. House of Representatives Committee on Energy & Commerce** in Washington, D.C.



regarding Medicare Access and the CHIP Reauthorization Act of 2015 (MACRA). The hearing was entitled “**MACRA** and **MIPS**: An Update on the Merit-based Incentive Payment System”.

## McNamara Fund for Professional Enrichment and Education and Nursing Scholarship Program

### 2018 SCHOLARSHIP RECIPIENTS

Sansum Clinic knows the value of investing in employee education and development. Through the generous support of donors, the **McNamara Fund for Professional Enrichment and Education**, and the **Nursing Scholarship Program** help to support both clinical and non-clinical employees with educational endeavors enabling them to reach their career goals.

Eight recipients were awarded with grants and scholarships toward development in their respective fields and careers. These programs continue to make a direct impact on our community, offering the assistance deserving staff needs in order to afford higher education and in developing our next generation of leaders.

### CONGRATULATIONS TO THE FOLLOWING RECIPIENTS:

#### **Debi Ames, Rn Specialist, Supervisor, Pesetas Urgent Care (Joined Sansum Clinic In 1997; Debi Is Now At Ridley-Tree Cancer Center)**

*“Sansum Clinic’s goal is to open a procedure center where patients from all over the Clinic will be able to come for care. This will include patients currently receiving chemotherapy, radiation and/or biotherapy. I will be supervising this department and working with nurses who will care for patients in the procedure center. Taking this course will help me to better understand what the patient is going through and how to anticipate patient needs.”*

#### **Monica Sanchez, Licensed Vocational Nurse, Solvang Country Clinic Family Practice (Joined Sansum Clinic In 2002)**

*“I started working at Sansum Clinic in the Medical Records department 15 years ago. Throughout the years, Sansum Clinic has given me the opportunity and flexibility to go to school and continue my education. As I begin my 10th year as a Licensed Vocational Nurse, I am thankful for all the opportunities, knowledge and confidence I have gained over the years. The McNamara grant will provide me the financial assistance needed to complete the final course for entrance into the Registered Nursing program.”*



*Debi Ames, Monica Sanchez, Jen McGahey, Heather Donovan, Jamie Romero, Alysha Izoco, Dale Klahn and Abigail Galler, with Chris McNamara, center, and Dr. Jim McNamara, front row*

# Awards & Recognition

## **Jen McGahey, Registered Nurse Manager, Lompoc Admin Patient Care Services (Joined Sansum Clinic in 2000)**

*"I have spent most of my nursing career at Sansum Clinic and have been afforded opportunities that I don't think I would have gained elsewhere. I have grown professionally and have broadened my skill base. I've chosen to enter a Bachelor of Arts in Healthcare Administration program to continue to enhance the skills that I have developed as a manager in healthcare. This program has already proven to be beneficial in terms of knowledge I have gained. I feel this opportunity will enable me to bring more value to this position or any position I may hold at Sansum Clinic in the future."*

## **Heather Donovan, Medical Services Coordinator, Pulmonary & Critical Care Medicine (Joined Sansum Clinic in 2015)**

*"I want to be able to provide my patients more support. I want to help my co-workers room patients and take vitals, and I'd like to work one-on-one with patients so they know that I am here to help them and that I have the skills to help them."*

## **Amie Romero, Medical Coding Manager, Corporate Coding Department (Joined Sansum in 2015)**

*"Earning the Risk Adjustment and Inpatient Coder certifications will allow me to grow personally and to develop my professional knowledge. This training will enable me to train staff within the department and work more effectively with providers throughout the Clinic. The education and training provided for these certifications will ultimately help Sansum Clinic meet insurance payer guidelines."*

## **Alysha Izoco, Health Educator Lead, Doctors' Weight Management Program (Joined Sansum Clinic in 2015)**

*"I have always had a huge interest in health and wellness, which ultimately led me to my current position with Sansum Clinic as a Health Educator. During my time here I have provided patients with behavioral counseling and nutrition education. Building on my foundational training, I have become proficient in coaching patients and have seen the role that successful coaching plays in our patients' overall experience."*

## **Dale Klahn, Analyst, Ehr, Wave Team (Joined Sansum Clinic in 2015)**

*"I have worked in Healthcare IT for more than 20 years both as a full time employee and as a consultant. I have been a full time employee of Sansum Clinic as an IT EHR analyst since September 2015. Although I have had years of experience implementing applications and integration projects at various organizations throughout my career, I have always thought that formal training in project management methodology would be a great benefit to me and my employer. I appreciate the opportunity that the McNamara Fund provides as a way to help accomplish that goal."*

## **Abigail Galler, Registered Nurse, Triage Lead, Pueblo Ob/Gyn (Joined Sansum Clinic in 2015)**

*"I have had the opportunity to grow not only as a nurse, but also as a person over the past three years at Sansum Clinic. When it comes to talking about healthcare and educating patients, my confidence booms knowing that I can provide the care and support that they need. I am passionate about empowering this vulnerable population. I wish to improve my teaching skills to become the best patient educator I can be."*

## **Dr. Erno S. Daniel Legacy Award**

**Damaris Campero, medical assistant, was awarded the Dr. Erno S. Daniel Legacy Award for 2018 by Dr. Bryce Holderness,** Pesetas Internal Medicine Department Chair. Sansum Clinic meant so much to **Dr. Daniel** who passed away in February 2015. Dr. Daniel was a knowledgeable, kind and caring internist who worked at Sansum Clinic for more than 37 years, taking care of thousands of patients, in many cases, several generations of the same family.

The Daniel Family chose to establish this award with gifts give to the Clinic in memory of Dr. Daniel. This award is given annually to an employee in the Pesetas Internal Medicine Department who exemplifies compassion, dedication and integrity.

**Martha Daniel** and her son **Mike Daniel** and close friends and donors to the program were in attendance at the awards luncheon. Also present were two previous award recipients, **Ervin Loeza** (2017) and **Alex Mahto, RN** (2016).

*The Daniel Family chose to establish this award with gifts give to the Clinic in memory of Dr. Daniel.*



*Dr. Bryce Holderness, Damaris Campero, Martha Daniel and Mike Daniel*

# New Sansum Clinic Physicians & Providers in 2018



**Andrew Beckler, MD**  
FACIAL PLASTIC & RECONSTRUCTIVE SURGERY  
215 PESETAS LANE, SANTA BARBARA  
OTOLARYNGOLOGY/ENT  
FOOTHILL MEDICAL & SURGICAL CENTER, ELINGS PAVILION  
4151 FOOTHILL ROAD, SANTA BARBARA

**Dr. Beckler** graduated magna cum laude from Washington and Lee University, attended medical school at the University of Virginia School of Medicine and completed his residency in Otolaryngology/Head and Neck Surgery at Vanderbilt University Medical Center. His residency training included adult and pediatric ear, nose and throat surgery, as well as facial plastic and reconstructive surgery. Dr. Beckler completed a fellowship in Facial Plastic and Reconstructive Surgery at UCLA. Prior to joining Sansum Clinic, Dr. Beckler worked and trained in Los Angeles, Beverly Hills and Santa Barbara and served on the UCLA faculty as a Clinical Instructor.



**Mica Bergman, MD**  
OPHTHALMOLOGY  
ELINGS EYE CENTER  
4151 FOOTHILL ROAD, SANTA BARBARA

**Dr. Bergman** attended graduate school and received her medical degree from Vanderbilt University in Nashville, Tennessee, where she also completed her internship in Ophthalmology. She completed her residency at Keck Hospital, University of Southern California and a fellowship in Oculoplastic Surgery at University of Southern California, Eyesthetica. Dr. Bergman is certified by the American Board of Ophthalmology.



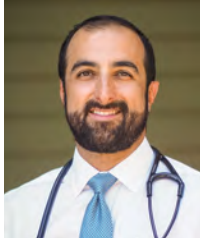
**Chad Burgoyne, MD**  
ORTHOPEDECS  
FOOTHILL MEDICAL & SURGICAL CENTER, ELINGS PAVILION  
4151 FOOTHILL ROAD, SANTA BARBARA

**Dr. Burgoyne** received his medical degree at Medical University of South Carolina. He completed his residency in Orthopedics at Mount Sinai Hospital in New York and his fellowship in Orthopedic Sports Medicine at West Coast Sports Medicine in Manhattan Beach, CA. Most recently he was an orthopedic surgeon at Providence Medical Group in Oregon. Dr. Burgoyne specializes in orthopedic sports medicine, sports trauma and orthopedic surgery.



**Zhe Cai, MD**  
INTERNAL MEDICINE  
SOLVANG COUNTRY CLINIC  
2027 VILLAGE LANE, SOLVANG

**Dr. Cai** graduated from Bethune Medical University and completed his internship and residency at Brookdale University Hospital Medical Center in Brooklyn, NY. He is certified by the American Board of Internal Medicine.



### Julian Davis, MD, MA

**MEDICAL ONCOLOGY & HEMATOLOGY  
RIDLEY-TREE CANCER CENTER  
540 W. PUEBLO STREET, SANTA BARBARA**

**Dr. Davis** graduated from University of California, Santa Barbara and received his medical degree from the Royal College of Surgeons School of Medicine in Ireland. He completed his residency and internships in Internal Medicine at Pennsylvania Hospital, University of Pennsylvania Health System. Dr. Davis was a Clinical Fellow in Hematology and Oncology at University of California, Davis Comprehensive Cancer Center and is certified by the American Board of Internal Medicine.



### Angelika Deloa, MD

**FAMILY MEDICINE  
CARPINTERIA FAMILY MEDICINE  
4806 CARPINTERIA AVENUE, CARPINTERIA**

**Dr. DeLoa** graduated from Rosalind Franklin University and received her medical degree from Chicago Medical School and completed her internships and residency in Family Medicine at St. Peter Family Medicine in Olympia, Washington. Dr. DeLoa is certified by the American Board of Family Medicine.



### Scott Dewhirst, MD

**PSYCHIATRY  
STATE STREET PSYCHIATRY & PSYCHOLOGY  
3916 STATE STREET, SUITE 300, SANTA BARBARA**

**Dr. Dewhirst** received his medical degree from University of New Mexico School of Medicine where he also completed his residency in Psychiatry. He completed his residency at Johns Hopkins Hospital in Baltimore, Maryland. Dr. Dewhirst is certified by the American Board of Psychiatry and Neurology.



### Bryan Garber, MD, MS

**PULMONARY & CRITICAL CARE MEDICINE  
301 W. PUEBLO STREET, SANTA BARBARA**

**Dr. Garber** earned a Masters in Science degree in Human Nutrition from Columbia University prior to attending medical school at the David Geffen School of Medicine at UCLA where he also completed his residency, chief residency and fellowship in pulmonary and critical care. He is certified by both the American Board of Internal Medicine and the American Board of Pulmonary Medicine.



### Maura Gilbert, NP

**URGENT CARE  
PESETAS MULTI-SPECIALTY CLINIC  
215 PESETAS LANE, SANTA BARBARA**

**Ms. Gilbert** graduated from California State University and is certified by the American Academy of Nurse Practitioners.



### Kateryna Markova, MD

**ENDOCRINOLOGY  
125 PESETAS LANE, SANTA BARBARA**

**Dr. Markova** completed Medical and Graduate School at National Medical University in Kiev, Ukraine before completing her residency and internship in Internal Medicine at Santa Barbara Cottage Hospital. She completed a fellowship in Endocrinology, Diabetes and Metabolism at University of Utah, Salt Lake City and is certified by the American Board of Internal Medicine in Internal Medicine and Endocrinology, Diabetes and Metabolism.

# New Sansum Clinic Physicians & Providers in 2018



**Leann McLaughlin, NP**  
INTERNAL MEDICINE  
PESETAS MULTI-SPECIALTY CLINIC  
215 PESETAS LANE, SANTA BARBARA

Ms. McLaughlin graduated from University of Missouri, Sinclair School of Nursing and is certified by the American Nurses Credentialing Center (ANCC).



**Sara Nimmons, MD**  
PEDIATRICS & ADOLESCENT MEDICINE  
51 HITCHCOCK WAY, SANTA BARBARA

**Dr. Nimmons** earned her bachelor's degree in Human Biology from University of Texas at Austin and received her medical degree from Texas A&M Health Science Center College of Medicine. She completed her residency in Pediatrics at Phoenix Children's Hospital/Maricopa Medical Center Pediatric Residency Program. Dr. Nimmons is a member of the American Academy of Pediatrics and the American Academy of Pediatrics, California.



**Casey Rives, MD**  
HOSPITALIST PROGRAM AND URGENT CARE  
217 W. PUEBLO STREET, SANTA BARBARA  
PESETAS URGENT CARE  
215 PESETAS LANE, SANTA BARBARA

**Dr. Rives** earned her medical degree from University of Missouri in Kansas City where she also completed her residency in Internal Medicine. Dr. Rives is certified by the American Board of Internal Medicine and the American Board of Pediatrics.



**Mananya Satayaprasert, MD**  
NEUROLOGY  
PUEBLO MULTI-SPECIALTY CLINIC  
317 W. PUEBLO STREET, SANTA BARBARA

**Dr. Satayaprasert** received her medical degree from Chulalongkorn University in Bangkok, Thailand and completed her residency in Neurology at University of Wisconsin Hospital & Clinics. She went on to complete an internship at Greater Baltimore Medical Center and a Neuromuscular Fellowship at Oregon Health & Science University. Dr. Satayaprasert is certified in Neuromuscular Medicine by the American Board of Psychiatry & Neurology.





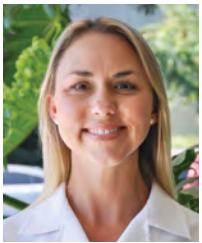
**Ena Sharma, MD**

**RHEUMATOLOGY**

**PESETAS MULTI-SPECIALTY CLINIC**

**215 PESETAS LANE, SANTA BARBARA**

**Dr. Sharma** received her medical degree from Texas Tech University where she also completed her residency and internship in Internal Medicine. She completed her fellowship in Rheumatology at University of California San Diego. Dr. Sharma is certified in Rheumatology by the American Board of Internal Medicine.



**Ashley Thorsell, MD**

**ENDOCRINOLOGY & INTERNAL MEDICINE**

**PESETAS MULTI-SPECIALTY CLINIC**

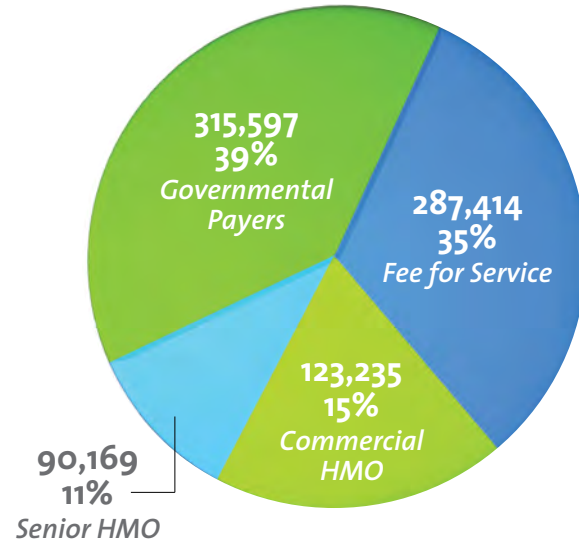
**215 PESETAS LANE, SANTA BARBARA**

**Dr. Thorsell** graduated from St. George's University School of Medicine and completed her residency in Internal Medicine and internship at Santa Barbara Cottage Hospital. She completed a fellowship in Endocrinology at Scripps Green Hospital in San Diego and is certified in both Internal Medicine and Endocrinology, Diabetes and Metabolism by the American Board of Internal Medicine.



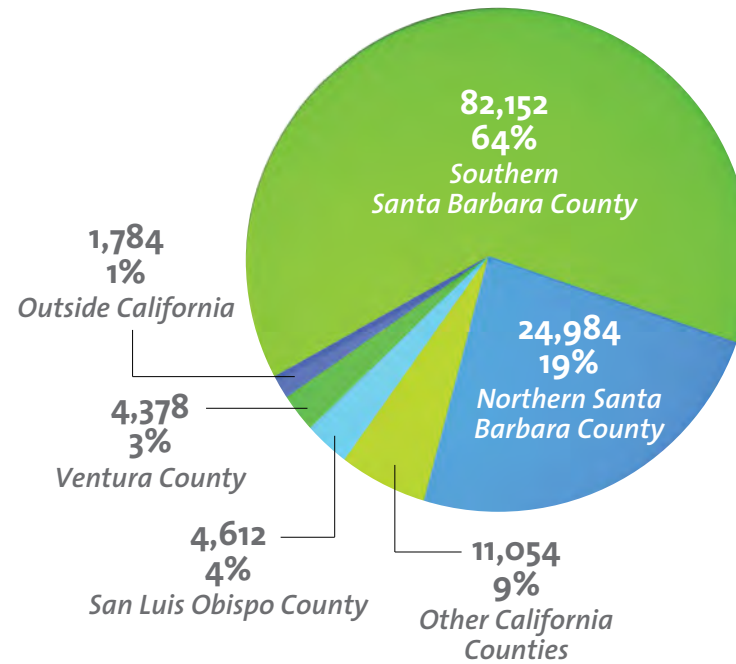
# Sansum Clinic by the Numbers

## Patient Visits by Insurance Category 2018



Insurer	Total Patient Visits 2018
Medicare	260,487
PPO	230,295
Commercial HMO	116,839
Senior HMO	84,691
Other Fee For Service	39,103
Medi-Cal	36,210
Medi-Cal HMO	18,879
Self-Pay	6,486
Commercial HMO-IPA	6,382
Senior HMO-IPA	5,478
Other	3,912
Workers Compensation	3,759
Indemnity	2,905
Charity Care	798
Other Government	136
Occupational Medicine	55
<b>Grand Total</b>	<b>816,415</b>

## Patients by County 2018



## Sansum Clinic Visits by Department

Department Name	Distinct Visits	Total Visits
Allergy & Immunology	3,778	7,097
Ambulatory Surgical Center (GI)	7,078	7,305
Anticoagulation Clinic	323	3,290
Cardiology	13,080	38,721
Clinical Research	26	41
Dermatology	18,395	31,587
Doctors' Weight Management	357	3,374
Ear, Nose and Throat	7,603	12,547
Endocrinology	10,429	20,974
Facial Plastic & Reconstructive Surgery	1,761	4,393
Family Medicine & Internal Medicine	63,877	137,019
Foothill Surgery Center	3,629	4,717
Gastroenterology	9,871	13,526
Genetic Counseling	794	1,052
Health Education	2,817	4,511
Infectious Disease	818	1,498
Medical Oncology	9,991	45,195
Nephrology	1,667	3,656
Neurology	6,768	10,826
Neurosurgery	477	514
Nuclear Medicine	4,130	8,415
Nurse Navigator	1	1
Obstetrics & Gynecology	12,550	28,077
Oncology Nutrition	836	2,545
Oncology Wellness	91	189
Ophthalmology & Optometry	20,125	57,679
Orthopedics	10,714	26,262
Pain Management	1,094	3,697
Pediatrics & Adolescent Medicine	16,051	40,559
Pharmacy	168	176
Physical Therapy	7,028	36,578
Podiatry	5,998	13,790
Procedure Center	2,259	5,861
Psychiatry & Psychology	2,635	9,425
Pulmonary & Critical Care	4,115	9,140
Radiation Oncology	1,686	28,885
Radiology	51,414	93,793
Rheumatology	5,062	11,827
Surgery	4,942	9,328
Surgical Oncology	936	1,803
Travel & Tropical Medicine	1,617	2,025
Urgent Care	41,222	56,531
Urology	8,170	17,986
<b>Total Patient Visits</b>	<b>128,964</b>	<b>816,415</b>



Total Patient Visits  
**816,415 Visits**

Distinct Patient Count  
**128,964 Patients**



## How You Can Help

Sansum Clinic is a nonprofit organization. Generous support from donors and grateful patients enables Sansum Clinic to offer community service programs that contribute to the wellbeing and quality of life of all members of the community.

If you wish to make a gift to Sansum Clinic or would like information, please contact Dru A. Hartley, Director of Philanthropy, at (805) 681-7726 or [dhartley@sansumclinic.org](mailto:dhartley@sansumclinic.org).

# Financial Statements

## Balance Sheet

Assets	2018	2017	Liabilities and Net Assets	2018	2017
<b>Current assets</b>			<b>Current liabilities</b>		
Cash and short-term investments	\$28,480,097	\$28,037,612	Accounts payable and accrued expenses	\$37,383,915	\$37,361,502
Patient accounts receivable	\$22,246,216	\$19,106,887	Current portion of long-term debt	\$4,168,256	\$3,806,513
Other current assets	\$10,601,690	\$6,363,603	Total current liabilities	\$41,552,171	\$41,168,015
Total current assets	\$61,328,003	\$53,508,092	<b>Long-term liabilities</b>		
<b>Property, plant and equipment, net of accumulated depreciation and amortization</b>			Long-term debt	\$36,915,966	\$40,604,789
	\$65,583,032	\$76,908,037	Other long-term liabilities	\$11,488,496	\$11,335,923
<b>Other assets</b>			Total long-term liabilities	\$48,404,462	\$51,940,712
Other assets	\$15,135,077	\$14,482,755	<b>Net assets</b>		
Total other assets	\$142,046,112	\$144,898,884	Unrestricted	\$46,264,297	\$46,080,753
			Restricted	\$5,825,182	\$5,709,404
			Total net assets	\$52,089,479	\$51,790,157
				\$142,046,112	\$144,898,884





## Statement of Cash Flows

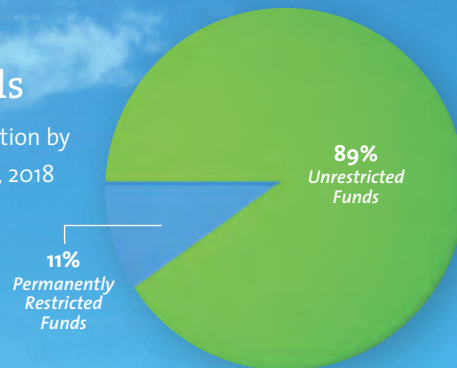
	2018	2017
<b>Cash flows from operating activities</b>		
Increase in net assets	\$299,322	\$2,696,270
Depreciation and amortization	\$9,235,659	\$9,250,833
Other changes in operating assets and liabilities	\$(2,038,968)	\$3,540,607
Net cash provided by operating activities	\$7,496,013	\$15,487,710
<b>Cash flows from investing activities</b>		
Net cash used in investing activities	\$(2,451,046)	\$(10,422,365)
<b>Cash flows from financing activities</b>		
Net cash provided/used in financing activities	\$(4,102,515)	\$(3,512,138)
Net change in cash and cash equivalents	\$942,452	\$1,553,207
Cash and cash equivalents, beginning of year	\$21,284,809	\$19,731,602
Cash and cash equivalents, end of year	\$22,227,261	\$ 21,284,809

## Statement of Operations

	2018	2017
<b>Revenues</b>		
Net patient service revenue	\$241,607,995	\$221,432,033
Premium revenue	\$67,053,827	\$67,416,682
Other revenue	\$12,863,826	\$14,767,333
Total unrestricted revenues, gains and other support	\$321,525,648	\$303,616,048
<b>Expenses</b>		
Medical service contracts	\$94,403,431	\$91,362,867
Salaries and employee benefits	\$86,077,271	\$86,203,869
Medical and professional expense	\$107,121,966	\$93,462,238
Occupancy expense	\$12,040,432	\$11,285,456
Other expenses	\$21,446,249	\$19,741,952
Total expenses	\$321,089,349	\$302,056,382
<b>Excess of revenues over expenses to fund clinical programs</b>	<u>\$436,299</u>	<u>\$1,559,666</u>

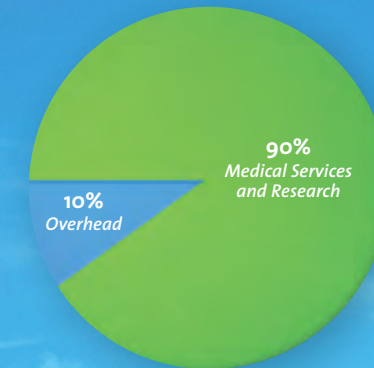
## Endowment Funds

Endowment net asset composition by type of fund as of December 31, 2018 was as follows:



## Functional Expenses

Sansum Clinic provides general healthcare services to residents within its geographic location. Expenses related to providing these services for 2018 are as follows:



Late last year, Sansum Clinic reached an agreement to transition our Lompoc building and clinical activities to Lompoc Valley Medical Center in order to provide a long-term stable platform for an excellent healthcare delivery system for the Lompoc Valley.

# Philanthropic Support

## Philanthropy at a Glance

We are so grateful to the loyal members of our donor community who help make it possible for us to provide the high quality healthcare our community needs and deserves.

### PHILANTHROPIC SUPPORT HAS ENABLED THE CLINIC TO:

- Build the Foothill Medical & Surgical Center and Elings Eye Center at the intersection of Foothill Road and Highway 154.
- Build the Ridley-Tree Cancer Center, a world-class regional diagnostic, treatment and research center, in partnership with the Cancer Foundation of Santa Barbara which celebrated its one year anniversary September 2018.
- Establish a new Pain Management Department that takes a multi-disciplinary approach to treating all kinds of acute or chronic pain.
- Establish a Palliative Care and Advance Care Planning Program to enhance the quality of life for patients who are being treated for a serious illness by addressing their physical, emotional, social and spiritual needs.
- Double the size of our Urgent Care department, expanded hours to 8am to 7pm every day, and initiated same-day appointments to better meet patients' needs.
- Expand our Primary Care capacity in the newly updated clinic at 215 Pesetas Lane, and increase our medical staff to include more than 70 primary care physicians.
- Recruit dozens of new physicians, over the last decade alone, through shared-appreciation home loans as part of the Physician Housing Program supported by Sansum Clinic's Lovelace Fund for Medical Excellence, resulting in a medical staff of more than 150 specialists in nearly 40 specialties.
- Modernize our facilities to enhance the patient experience at the Pediatrics and Adolescent Medicine and Allergy Departments on Hitchcock Way; Obstetrics and Gynecology on Pueblo Street and the Oncology Department in Solvang.
- Purchase two mammogram machines and the Invenia Automated Breast Ultrasound System that provides advanced breast screening.
- Purchase an emergency generator at Pesetas Lane as part of Santa Barbara's Emergency Preparedness Program.
- Establish the Prescription Navigator Program, a pharmacist-led medication therapy management program that ensures the safe, effective, and appropriate use of medications by patients.
- Advance the level of surgical care available in our community through Sansum Clinic's Visiting Professor of Surgery Education Program that brings national and international experts to our community for one week each year.
- Create an education fund to provide clinical and non-clinical staff with unique personal and professional development opportunities that will expand their value within the Clinic and create a stronger and more dynamic platform for healthcare delivery.
- Provide the underserved residents of our community who have no health insurance with free diagnostic services and colonoscopy screenings through our partnership with the Santa Barbara Neighborhood Clinics.
- Provide free eye care to the underserved residents of our community with no health insurance through our partnership with SEE International.
- Offer Health Education Programs free or at a nominal fee.

Within Sansum Clinic and Ridley-Tree Cancer Center our physicians and staff established the **Employee Assistance Fund** and contributed voluntary gifts of paid time off and cash that enabled us to replenish a large percentage of paid time off and wages lost as a result of the Thomas Fire and debris flow for those unable to get to work. We remained fully operational during that time as a result of our dedicated staff.

As a nonprofit organization dedicated to healthcare in an era of diminishing insurance reimbursements, our commitment to providing exceptional care will rely, increasingly, on the generosity of our donors.

We are truly grateful for every gift we receive, no matter the amount. Your support contributes to good health for everyone. You are an important partner in our current and future success. Working together we can continue to better serve you, our patients and the community.

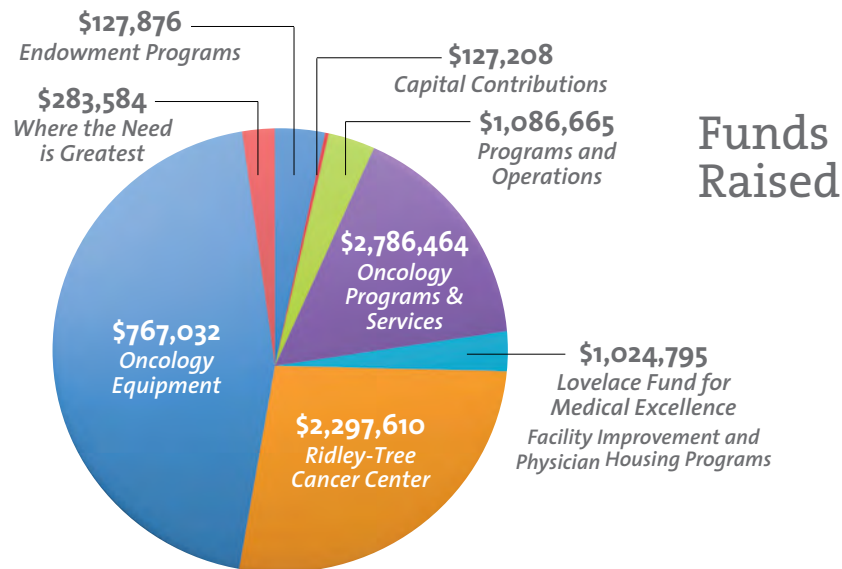
For information on how you can support Sansum Clinic or the Ridley-Tree Cancer Center please contact:

**Dru A. Hartley**

Director of Philanthropy, Sansum Clinic

P.O. Box 1200, Santa Barbara, CA 93102-1200

**(805) 681-7726 • [dhartley@sansumclinic.org](mailto:dhartley@sansumclinic.org) • [sansumclinic.org/donate-now](http://sansumclinic.org/donate-now)**



Unrestricted Gifts	\$	283,584
Restricted Gifts	\$	1,152,671
Capital Contributions	\$	3,191,850
Programs and Operations	\$	3,873,129
<b>Total</b>	<b>\$</b>	<b>8,501,234</b>



The **Lovelace Fund for Medical Excellence** is used for programs that assist Sansum Clinic in the recruitment and retention of physicians, including the **Physician Housing and the Facility Improvement Programs**. It is also used for other endeavors which are deemed to ensure medical excellence for our patients.

Sansum Clinic’s Board of Trustees established The Lovelace Fund for Medical Excellence in 2012 as a tribute to the late Jon Lovelace and the Lovelace Family for their visionary support of Sansum Clinic.

In addition to the Lovelace Family we also receive support from a number of other community contributors, including our Trustees who have embraced the vision of the Lovelace Family in supporting Sansum Clinic.

The Lovelace Fund for Medical Excellence and the Physician Housing and Facility Improvement Programs help provide a lasting legacy to Sansum Clinic and Santa Barbara and the more than 130,000 patients who trust us with their medical care each year. It also enables the Clinic to keep pace with the rapidly changing healthcare environment, and anticipating the community’s needs.

## Physician Housing Program

The very generous financial support of the Lovelace Family has been instrumental in the recruitment and retention of highly skilled physicians in a broad range of specialties and practice areas coming to Santa Barbara through our innovative **Physician Housing Program**.

This program assists new physicians in obtaining shared appreciation loans to help with the purchase of homes in our high-priced real estate market. The 26 physicians who used loans last year saw 37,034 unique patients at 91,298 patient visits in Cardiology, Dermatology, Gastroenterology, General Surgery, Hematology/Oncology, Infectious Diseases, Internal Medicine, Neurology, Obstetrics and Gynecology, Ophthalmology, Orthopedics, Pulmonary/Critical Care and Rheumatology.

A Cardiologist was named **Physician of the Year by Cottage Health** and another Cardiologist was a *Pacific Coast Business Times* Healthcare Champion.

The physician housing program has been designed to be a revolving fund, whereby the proceeds from future home sales will be used to repay outstanding loans and flow back into the program, where they can be used again to help future physicians meet their housing needs.

## Facility Improvement Program

This program assists us in modernizing our facilities to enhance our patients' experience and support our ongoing efforts to attract the highest caliber physicians from around the United States. We refreshed our clinic at 317 West Pueblo Street and relocated certain departments to provide additional capacity and improved access to timely appointments.

For information about the Lovelace Fund for Medical Excellence or to make a gift of support please contact **Dru A. Hartley, Director of Philanthropy at Sansum Clinic at (805) 681-7726, dhartley@sansumclinic.org**



### Sansum Clinic Welcomed First International Visiting Professor of Surgery

**Professor O. James Garden** was selected as the Visiting Professor of Surgery for Surgical Academic Week 2018. Sansum Clinic's Visiting Professor of Surgery program provides expert educational seminars for practicing Santa Barbara surgeons and physicians. More importantly, it allows surgical residents in training at Santa Barbara Cottage Hospital the chance to interact with the icons, leaders and outstanding teachers of the art of surgery.

*"Dr. Ron Latimer had a vision for this program and in the seven years since it began, we have been fortunate to welcome outstanding surgeons to our community,"* said

**Kurt N. Ransohoff, MD, FACP, CEO** of Sansum Clinic. *"By sharing their expertise with our surgical residents, surgical staff and patients, we are able to elevate the level of surgical knowledge available in Santa Barbara. This program is one of the many examples of why we are so fortunate to have exceptional healthcare available in our small community."*

Professor Garden is the Regius Professor of Clinical Surgery and Honorary Consultant Surgeon, Hepatobiliary and Pancreatic Surgical Services, Royal Infirmary of Edinburgh, University of Edinburgh. He was appointed Surgeon to the Queen in Scotland in 2004 and was made Commander of the British Empire in the Queen's New Year's Honors list in 2014. He is a graduate of the University of Edinburgh and undertook his postgraduate training as a hepatobiliary, pancreatic and liver transplant surgeon in Edinburgh, Glasgow and Paris. He has written extensively with nearly 270 research and clinical articles to his name and he has authored or edited 13 surgical textbooks. He has a strong interest in surgical training and education.

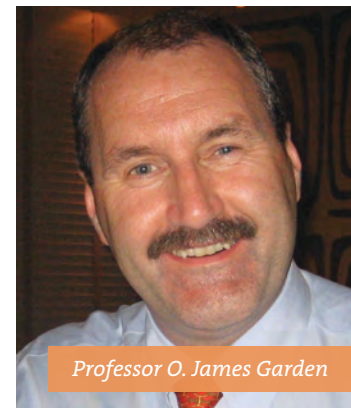
### Professor Garden presented a public lecture on Edinburgh's Illuminati:

**Charles Darwin, Sir Arthur Conan Doyle, Lord Lister and Grave Robbers (Knox, Burke and Hare)** and how they significantly contributed to advancements in Medicine and Surgery.

### Professor Garden followed six previous Visiting Professors:

**Dr. John L. Cameron** (Johns Hopkins) 2012, **Dr. Hiram C. Polk, Jr.** (University of Louisville) 2013, **Dr. Julie Ann Freischlag** (UC Davis School of Medicine) 2014, **Dr. Keith D. Lillemoe** (Massachusetts General Hospital) 2015, **Dr. Michael G. Sarr** (Mayo Clinic) 2016, **Dr. Barbara Lee Bass** 2017 (Houston Methodist Hospital).

This unique educational program advances the level of surgical care available in our community, and is made possible by generous support from the title sponsor, Cottage Health, and grateful patients, medical groups, individual community surgeons and physicians, and corporate donors.

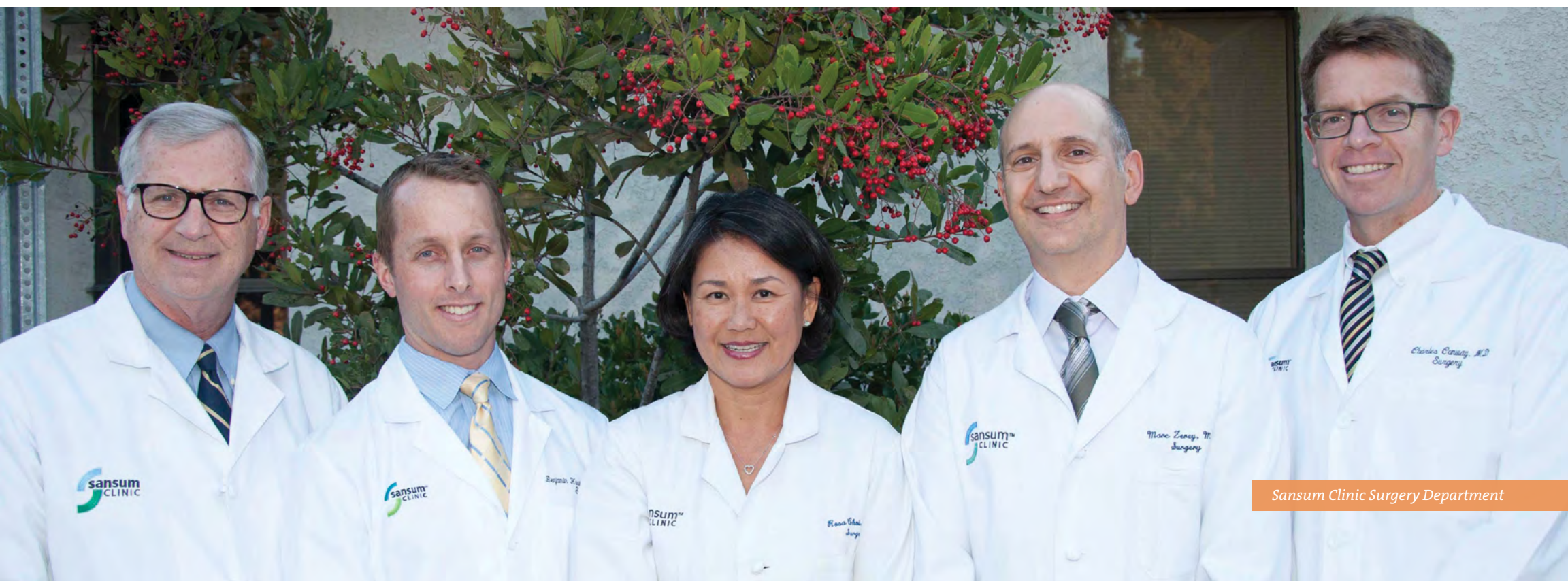


Professor O. James Garden





Professor Garden with Surgery Residents



Sansum Clinic Surgery Department

# Thank You to Our Donors

Sansum Clinic gratefully acknowledges the generous support of our donors \$1,000+ from January 1 to December 31, 2018. Our donors serve an incredibly important role in helping us provide the high quality healthcare our community needs and deserves. Our ability to utilize the most advanced technology and deliver the most compassionate care is why Sansum Clinic is the first choice of 130,000 patients and why the community has been coming to us for their healthcare for **almost 100 years**. Working together we can continue to better serve you, our patients and the community.

## \$1,000,000+

Cancer Foundation  
of Santa Barbara  
Virgil Elings, PhD  
Mr. and Mrs. William  
H. Williams

## \$500,000 - \$999,999

The Wolf Family Foundation

## \$100,000 - \$499,999

Guenter and June Ahlers  
Jeffrey and Judy Henley/  
J & J Foundation  
Julie Nadel and  
The Nadel Foundation  
Dr. Nancy O'Reilly  
Mary Lynn and Warren Staley  
Benjamin and Valerie Wayne

## \$50,000 - \$99,999

Anonymous  
Jennie T. Dearmin Trust

## \$25,000 - \$49,999

Anonymous  
Leslie and Philip Bernstein  
Mr. and Mrs. Paul W. Hartloff, Jr.  
JL Foundation  
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Julie and Jamie Kellner  
Alex Pananides  
Rusack Family Foundation  
Mike and Shannon Sanders  
Sansum Santa Barbara  
Medical Clinic, Inc.

## \$10,000 - \$24,999

Donovan and Kathryn Chalfant  
Cottage Health  
Bret E. Davis, MD, FACP  
Robert and Christine Emmons  
Dr. and Mrs. John Gainor  
Vicki and Bob Hazard  
Mr. and Mrs. Jeffrey Jacobs  
Paul and Pamela Jepson

Lisa Markham  
Kay R. McMillan  
John Mithun and Mercedes  
Millington/John C. Mithun  
Foundation  
Montecito Bank & Trust  
Bobbie and Eddie Rosenblatt  
Betsy Sales  
Maryan Schall  
Swanton Foundation  
Anne Smith Towbes

## \$5,000 to \$9,999

Anonymous  
Ruth E. Brackett  
Bronwen Brindley, MD and  
John L. Warren  
Joanie and Roger Craton  
Nancy Englander  
Ryan and Genevieve Fante  
Roberta and Stan Fishman  
Christine Garvey and George Gelles  
Giles Family Foundation  
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Richard Steinberg, PhD  
Helga and Francis Sulger  
Mr. and Mrs. Steve Zola

## \$2,500 - \$4,999

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Beatrice A. Askman  
Charitable Foundation  
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Mr. and Mrs. Kenneth Coates

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James and Ronda Dunn	John and Megan Shapiro	Ben and Molly Diener	The Kunkel Family	Mary Kay Robinson Foundation	Eliot Crowley
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Beverlye and Bob Fead	Mr. and Mrs. Peter Stalker	James and Marguerite Downing	Robert Leder	Page and Emily Roos	Nancie Dudash
Chris and Caryn Felipe	James M. Stubchaer	Ginni and Chad* Dreier	Charles R. Loepkey	Peggy Rose	Beverlye Hyman Fead
Mr. and Mrs. J. Thomas Fly	Jim and Denise Taylor	James Egan, MD	Lorraine M. McDonnell and M. Stephen Weatherford	Bob and Joan Rothenberg	Jane A. Gonzalez
Janet A. Garufis	Jay and Darlene Te Velde	John and Mimi Elder	Steve and Nicole McHugh	Barbara N. Rubin Foundation	Mary Ellen Gutierrez
Frank and Joseph Gila Fund	Timothy and Laura Uhl	David and Monica Fishman	Dr. James V. and Christine McNamara	Tony and Mary Salierno	H&R Investments
Nancy Gong	Elizabeth Vos	Caroline S. Gadsby	Arthur J. Merovick	John and Suzanne Sanford	Halos of Hope
Mr. and Mrs. Peter W. Gray	<b>\$1,000 - \$2,499</b>	Priti Gagneja, MD and M. Salman Haq, MD	James M. Merrick and Elizabeth Matthews	William E. Sanson	Richard and Nina Hunt
Gloria and Paul Griffin	Anonymous (3)	Gardner Grout Foundation	Richard and JoAnne Meurer	M. Stanley Schlosser	Sean Johnson
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As a non-profit organization, Sansum Clinic relies on private support so that we may continue our commitment to the healthcare needs of our patients and the community. We have made every effort to ensure accurate information. If there are any errors or omissions please accept our apology and contact **Dru A. Hartley**, Director of Philanthropy at **(805) 681-7726** or [dhartley@sansumclinic.org](mailto:dhartley@sansumclinic.org).

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Today, more than ever, philanthropic support is essential to our mission to provide an excellent healthcare experience, recognizing our first priority is the patients we serve.

By leaving a lasting legacy to Sansum Clinic, you will long be remembered for your thoughtfulness and generosity. Your gift will provide future generations with the quality healthcare that you have come to expect – and receive – from our outstanding physicians and healthcare providers at Sansum Clinic.

Sansum Clinic’s **Legacy Society** honors the loyal individuals who have included Sansum Clinic in their estate plans. Our members are dedicated to helping Sansum Clinic bring together the best physicians, the latest technologies and the most

comprehensive healthcare to meet the specialized needs of our community.

If you have already provided a gift in your estate plan, please let us know so we may thank you and include you as a member in our Legacy Society.

If you wish to leave a gift or would like information about the Legacy Society, please contact **Dru A. Hartley, Director of Philanthropy**, at **(806) 681-7726** or [dhartley@sansumclinic.org](mailto:dhartley@sansumclinic.org).

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*A Legacy of Giving*

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Special thanks to longtime members of our **Board of Trustees** whose term came to an end in 2018. During their time as Trustees, Sansum Clinic formally changed its name from Sansum Santa Barbara Medical Foundation Clinic Inc., and **merged with the Cancer Center of Santa Barbara** to enhance the level of cancer care available in our community. We completed the enormous **transition from paper medical records to electronic health records**, built the **Foothill Medical & Surgical Center** and **Elings Eye Center**, and opened our first ambulatory surgical center, **The Foothill Surgery Center at Sansum Clinic**. We built the **Ridley-Tree Cancer Center at Sansum Clinic**. We **recruited dozens of highly trained physicians** from world-class institutions. And among many other accomplishments, we **cared for hundreds of thousands of patients at more than a million visits**. We greatly appreciate the leadership of this special group of Trustees.

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*Sansum Clinic's mission is to provide an excellent healthcare experience, recognizing our first priority is the patients we serve.*

# Vision

*As a premier integrated delivery system we provide high-value healthcare to the communities we serve, managing the population's healthcare needs while also creating a model of care that will thrive in California's rapidly changing healthcare arena.*

# Values

*Compassion  
Accountability  
Respect  
Excellence  
Stewardship*



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