

Leading the Way in
Medical Excellence

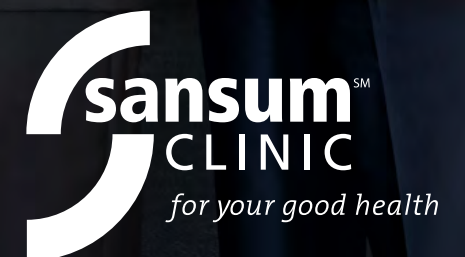
2019 Annual
Report



Leading the Way in Medical Excellence



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



Dear Patients and Donors,

2019 marked Sansum Clinic's **98th year** of providing excellence in healthcare to our community. Our founders could never have imagined how we have grown nor how we have adapted to the challenges of the last several months. Despite a global pandemic, we have continued to deliver on our mission to provide care even in unprecedented times of disaster or economic crisis. That promise which is now nearly a century-old, stands firm. Many of the strategies implemented in 2019 prepared us to handle the myriad obstacles we are facing in 2020.

We recruited new physicians and opened new departments, which strengthened our ability to provide high quality care for important medical conditions that don't stop just because we are in a global pandemic. Our **Palliative Care** and **Advance Care Planning**, and **Pain Management** programs are meeting important medical and social needs during a critical time.

The work we performed in 2019 prepared us for our March 2020 implementation of the **Wave (Epic) Revenue Cycle**, the most significant upgrade to our electronic health record in the past nine years. This upgrade not only positions us strategically, it also enabled us to quickly respond to the COVID-19 crisis to help our patients and our providers. The Wave Revenue Cycle provided us the platform to rapidly adapt our business model to the new realities of a global pandemic. We were able to launch a **Telehealth** program where our providers were able to safely treat patients remotely, using state-of-the-art video visits. The improvements within the new **Wave (EPIC)** system provided us the ability to accurately capture data required by the **Centers for Medicaid and Medicare** as well as private health insurance companies so the Clinic could be reimbursed for these newly-covered healthcare services.

A push to encourage **MyChart** participation allowed our **95,000+ patients** with active accounts to safely message their healthcare providers to determine if they needed in-clinic appointments, or if their medical conditions could be addressed appropriately via Telehealth visits during Governor Gavin Newsom's stay-at-home order.

The ongoing development of our **Coastal One Health Partners (COHP) Accountable Care Organization (ACO)** has solidified our partnership with Cottage Health and led to improved coordination of care through the exchange of ideas and data, all of which improve our ability to partner in keeping our community safe during this challenging time.

Our **WE CARE** program provided our staff members with a robust customer service framework to draw on while adapting to the frequently-changing procedures required to provide quality care in a socially-distancing environment. *"I'm smiling under my mask"* quickly became a mantra shared by many of our employees and physicians working closely with patients during this pandemic.

The support of our grateful patients who invest in Sansum Clinic through generous philanthropic gifts has been essential to securing PPE during this global shortage, and to maintaining important patient programs like our supportive care programs at Ridley-Tree Cancer Center.

All of these examples of our progress provide a glimpse into the achievements we will highlight next year in our 2020 Annual Report. In the meantime, we think our 2019 accomplishments are the groundwork and absolutely something to celebrate. As you read this report, we hope our steadfast commitment to successfully adapting to the ever-changing healthcare environment to care for the needs of our community is evident.

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

Sincerely,



Alex Bauer, EJD, MBA, CPA
Chief Financial Officer



Janet A. Garufis
Chair, Board of Trustees



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



Arnold Schaffer
Vice Chair, Board of Trustees



Chad Hine, MBA
Chief Operating Officer



Stephen Jones
Vice Chair, Board of Trustees



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Advancements in Operations

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Palliative Care and Advance Care Planning

Sansum Clinic Opens Pain Management Department

Sansum Clinic's Inaugural Advance Care Planning Month

State of the Foothill Surgery Center

Two World-Class Surgeons Return to California

Patient Business Services and Sansum Enterprise Applications

Business Continuity and Disaster Recovery Program



Dr. Deborah Meyers and the Palliative Care Team



Palliative Care and Advance Care Planning

Sansum Clinic established the **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 addresses the physical, emotional, social and spiritual needs by facilitating patient autonomy and access to information.

Dr. Deborah Meyers and the Palliative Care Team explore the patients understanding about their illness and prognosis and help them clarify patient treatment goals and wishes, and provide care to those who need their expertise.

The primary services are provided within Sansum Clinic’s Ridley-Tree Cancer Center and 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 is 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 not more than they want.”*

A social worker is a certified ACP provider and incorporates advance care planning, as well as completion of advance directives, and if appropriate, POLST documentation, as part of the program.

The Palliative Care Team thoroughly addresses the patients’ pain and comfort care issues. They engage patients in a meaningful discussion about healthcare goals and preferences, including advance care planning and end of life goals and ensuring patients have appropriate/early access to hospice and other critical patient-oriented programs as needed as their disease progresses. They 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 most 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 non-cancer related conditions, including neurological disease (like ALS or dementia), heart disease, lung disease, kidney disease and other conditions.

By engaging patients early in the disease course, clinic-based Palliative Care services support patients, over time, in achieving maximum symptom control and 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 is a multidisciplinary program that “touches” all departments within Sansum Clinic and the Ridley-Tree Cancer Center.

In the first 10 weeks of the program (October 15 – December 31) Dr. Meyers opened clinic hours, and hired the palliative care nurse, social worker and clinical coordinator. Dr. Meyers saw **74 unique patients** in consultation, with **126 total visits** (77% oncology patients, 23% other specialty referrals). The team completed **38 advanced care documents**.

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



For the first time, Sansum Clinic conducted a comprehensive education and outreach campaign about Advance Care Planning (ACP) designed for the community as well as Sansum Clinic employees.

- Sansum Clinic provided resources for employees to learn about ACP and to complete their own ACP documents if desired.
- ACP-related contacts increased from 2018 to 2019 in the areas tracked over time:
 - workshop attendance almost doubled from 160 to 310 contacts.
 - appointments with the ACP Facilitator increased from 100 to 161 appointments.
- Improvements in documentation and reporting were implemented so that we now have the ability to track ACP conversations with social workers and health care providers throughout Sansum Clinic.
- New tools were created which will continue to be utilized, including a dedicated web page with videos, instructions and forms as well as an easy method to get patient approval to forward their forms to Cottage Health.
- Employee meetings were held on 11 days in 7 locations during the month of April to provide easy access to individual consultations and notary service for employees to complete their own Advance Directives.
- The number of community workshops at Sansum Clinic was increased from 1 to 2 per month with a new workshop added specifically for Ridley-Tree Cancer Center.
- For employees, 34 received a consultation, 9 received notary service and 8 received both, for a total of 59 appointments completed by 51 individuals.
- For the 17 employees who had their documents notarized, the form was sent to their medical record at Sansum Clinic and to Cottage Health.
- All of the above contributed to an increase in the number of ACP documents scanned into Sansum Clinic charts from an average of 1,364 per year in the previous 3 years (2016, 2017, 2018) to 1,587 in 2019, an increase of 14%.

The Advance Care Planning Program has now been incorporated into the Palliative Care and Advance Care Planning program.

Sansum Clinic Opens Pain Management Department

In 2019, Sansum Clinic opened its **Pain Management Department** at 3916 State Street, Suite 300. Pain management is a rapidly growing medical specialty that takes a multi-disciplinary approach to treating all kinds of acute or chronic pain.

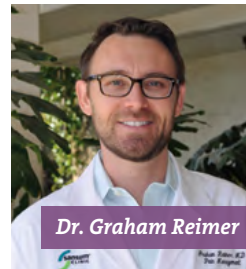
Dr. Graham Reimer joined the Clinic from a large group in Phoenix where he practiced comprehensive and interventional pain medicine. He was a pain medicine fellow at Mayo Clinic Florida where he trained with world experts in interventional spine and ultrasound guided-procedures. He is board certified in anesthesiology and subspecialty certified in pain medicine by the American Board of Anesthesiology.

Dr. Reimer and his team utilize innovative state-of-the-art medical and intervention pain treatments to ease or eliminate pain and provide patients with the tools to make coping with pain more manageable in order to regain control of their lives.

Pain management can be simple or complex and treatment plans will be individualized for each patient to improve patient function and increase quality of life.



Dr. Reimer saw 938 unique patients at 4,527 patient visits. Sansum Clinic will welcome a second physician in September. **Dr. Emanuel Zusmer** is a native of Santa Barbara and he's currently in a pain management fellowship at Oregon Health & Science University. We look forward to having him join us.



Dr. Graham Reimer

This program has been made possible through the generous support of **Guenter** and **June Ahlers**.

State of the Foothill Surgery Center at Sansum Clinic

In 2019, we celebrated the **5th anniversary of the Foothill Surgery Center at Sansum Clinic** in the **Elings Pavilion**. As one of the preeminent surgery centers in our community, the center continued to expand its high-quality services in a cost-effective and friendly setting.

Dr. Katrina Mitchell, breast surgical oncologist, and **Dr. Graham Reimer**, pain management specialist, joined the medical group at the surgery center. The **Pain Management** department's monthly **patient volume increased by 25%**. Overall **patient volumes at the Center increased 17% from 2018**.

While the national standard for rate of infection at ambulatory surgery centers is **less than 3%**, the rate of infection remains stable with **less than 1%** of total volume.

Staff turnover is less than 2%. The surgery center consistently scores in the **mid-90s** for patient satisfaction.

The Foothill Surgery Center is accredited for excellence in delivery of care 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.



FOOTHILL SURGERY CENTER
at sansum CLINIC

The Team at Foothill Surgery Center at Sansum Clinic

Two World-Class Surgeons Return to California with Expertise that Keeps Santa Barbara at the Forefront of Medical Excellence



**BOARD-CERTIFIED COLORECTAL SURGEON
CHRISTINA HARNBERGER, MD**

Dr. Christina Harnsberger left her hometown to pursue her dream of a medical education and she returned to Santa Barbara in 2019 double-board certified in general and colorectal surgery. With Sansum Clinic and Ridley-Tree

Cancer Center as her home base, she treats a wide variety of conditions, most commonly colorectal cancer, which can be prevented in many cases if detected early. She also sees patients for diverticulitis, inflammatory bowel disease and polyps which are too large to be removed during a colonoscopy. She uses many of the latest devices and surgical techniques that make procedures less invasive, such as laparoscopic and robotic surgery. *“The outcome of the surgery is no different using these new technologies, however recovery time is faster and allows patients to return to their normal lives more quickly,”* explains Dr. Harnsberger.

Dr. Harnsberger received her undergraduate degree in molecular and cell biology at the University of California, Berkeley, and her medical degree from the University

“It was beyond my wildest dreams that I would ever get to come back and serve the community that has given so much to me”

of California, Irvine School of Medicine. During her residency at the University of California, San Diego, she developed a love for general surgery which led her to the colorectal surgery

training program at the University of Massachusetts. Two years of research into minimally-invasive surgical techniques exposed her to some of the most innovative approaches in her field.

After touring a wide variety of institutions and medical organizations, Dr. Harnsberger was gratified to learn that returning to a small community would

not mean sacrificing resources. *“We have the ability to provide the level of top-notch care that would be delivered at major academic medical centers,”* she notes. A recipient of a medical school scholarship through BP Foundation and the Santa Barbara Scholarship Foundation, Dr. Harnsberger sees her new position as a chance to pay it forward. *“It was beyond my wildest dreams that I would ever get to come back and serve the community that has given so much to me,”* says the surgeon. *“The privilege is wonderful.”*



**FELLOWSHIP-TRAINED BREAST SURGEON
KATRINA MITCHELL, MD, IBCLC, FACS**

Fellowship-trained breast surgeon **Dr. Mitchell** is now the second breast surgeon on the Ridley-Tree Cancer Center breast care team alongside 20-year veteran, **Rosa Choi, MD, FACS**. *“I really value having a surgical partner who has*

been in practice for two decades. That experience over time is extremely helpful,” Dr. Mitchell says of Dr. Choi. Dr. Mitchell feels strongly that female patients with a breast cancer diagnosis should see a surgeon who only does breast surgery. *“This is a nuanced, super-specialized aspect of medicine. It’s not just taking out a mass. It’s understanding what kind of breast cancer it is, whether you can do any breast preservation, whether chemotherapy should be done before or after surgery,”* she added. Raised in California’s central valley, Dr. Mitchell was incredibly pleased to return to her home state, and to join a cancer center with a multidisciplinary approach to care.

“I really value having a surgical partner who has been in practice for two decades”

Dr. Mitchell’s passion for women’s health was born on the east coast when after graduating from Bowdoin College in coastal Maine, she worked at an inner-city Philadelphia women’s health center. She ultimately turned her sights toward becoming a physician herself and pursued a degree from Dartmouth Medical School. She completed a surgical internship and residency at New York Presbyterian/Weill Cornell Medical Center. Her residency included time at Memorial Sloan Kettering Cancer Center and three years of research with Cornell’s

partner hospital in Tanzania. Dr. Mitchell completed her breast surgical oncology fellowship at MD Anderson Cancer Center in Texas where she immersed herself in the latest forms of breast cancer treatment and research. Afterwards, she launched a new breast cancer surgery program at an MD Anderson network hospital in Albuquerque, New Mexico. Through her own experiences breastfeeding her son and treating patients with complications of breastfeeding, Dr. Mitchell decided to earn certification as a lactation consultant. To help close the gap in breastfeeding education for doctors, she developed a breastfeeding medicine course for breast surgeons that she offers in the U.S. and around the world.

Patient Business Services and Sansum Enterprise Applications



In 2019, Sansum Clinic reorganized and rebranded the financial departments that work on receiving payment for the healthcare services we provide, including the billing and insurance functions, which are now known as the **Patient Business Services Department**. The new logo is a colorful puzzle with interlocking parts, a reflection of the many people who gather and document important patient information each day across more than 22 clinic locations. *“From the medical services coordinator who handles registration to the doctor who documents an office visit, each employee plays a critical role,”* according to Chief Financial Officer **Alex Bauer**.

Bauer and his team began an organization-wide educational effort in the fall so all Sansum Clinic staff could have a better understanding of this process. Managers examined how to refine and improve this giant data haul at every stage. *“We focused on making this as easy and streamlined as possible for our customers. It’s an effort to get it right for the patient, so their services are covered or paid for,”* explains Bauer. Even for someone who has a law degree, an MBA and years of accounting experience, this executive can relate to patients navigating the difficult terrain of health insurance coverage. *“Even when I look at my own insurance explanation of benefits document, I find it confusing. And I live this stuff every day. We want to help patients understand,”* says Bauer.



This reorganization and rebrand was a precursor to some of the new features of our **Electronic Health Record** and **MyChart** applications introduced in the spring of 2020. They offer many useful upgrades.

Sansum Clinic’s Applications and Analytics VP Sean Johnson has led the charge to bring the latest digital information technology improvements to our system, so access is quick and easy, and our patients receive better quality of care. *“For the first time, patients can schedule appointments directly from their computers and smartphones. Patients can also check-in for their appointments, make payments, request estimates, as well as send questions directly to the Patient Business Services Department about their account,”* describes Johnson.

The **Sansum Enterprise Applications** team has a successful year with the work and planning for the Wave Revenue Cycle that launched in March 2020, a new Data Center in Las Vegas and a 5 Version Wave Upgrade.

- **97,852 MyChart Patients**
- **77,679 Sheets of Paper Saved by E-Prescribing Controlled Substances**
- **12,833 Wave Support Calls from Patients**
- **7,010 Wave Support Calls from Sansum Staff and Providers**
- **3,825 Closed Helpdesk Tickets**



Business Continuity and Disaster Recovery Program

Implementation of the board-approved **Business Continuity and Disaster Recovery program** started in 2019. As a result, during the past 12-month period, Sansum has effectively put in place a private cloud infrastructure solution with multiple datacenters based in and outside of our region. This solution is comprised of platforms that utilize a combination of vendor and on premise data services to deliver application redundancy and resiliency. This will ensure that continuity of service for our patients can be maintained in the event of an unexpected application or system disruption. The **Wave** and the **new revenue cycle system** are now fully implemented on this solution.

Over the next few years, Sansum will continue to build on these platforms to add capacity, and expand our capability to **The Electronic Health Record**, extend redundancy and resiliency to a broader set of applications and computer-based services at Sansum.



Information Technology and Analytics

Sansum continued to build upon its **analytics platform** and **Data Warehouse** in 2019. Efforts were focused largely in the development and deployment of sophisticated Business Intelligence and reporting tools. These new tools turn the data stored in our Data Warehouse into a powerful source of information, enabling rapid access and analysis of clinical, financial and overall trends within the Clinic. These newly developed tools also have allowed for more timely distribution of data to the right audiences, facilitating strategic decision making. Having quick access to this kind of knowledge helps keep the Clinic nimble in its responses to the rapidly changing challenges in the healthcare landscape. Our ability to deliver high quality care through the delivery of efficient, cost effective healthcare services, known as ‘Value-Based Care’, is increasingly important. 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 essential to know within the Value-Based Care framework. Having access to this combined information supports Clinic leadership in making timely decisions to stay on track towards meeting our goals.

Tracking Quality and Scorecards

Sansum Clinic remains dedicated to continuous improvement of our clinical quality scores, a large focus of which occurs within 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 our performance goals.

Department Scorecard					
Quality	Outcome	% Goal	% Actual	Num/Denom	Score
Measure 1	●	80	87%	12249 / 14063	4
Measure 2	●	85	89%	5713 / 6422	4
Measure 3	●	70	66%	2888 / 4349	0
Measure 4	●	88	88%	3577 / 4065	4
Measure 5	●	80	81%	3481 / 4271	4
Measure 6	●	65	65%	192 / 295	4
Measure 7	●	80	79%	5543 / 7042	0
Measure 8	●	60	78%	9235 / 11897	4
Measure 9	●	60	62%	802 / 1292	4
Measure 10	●	90	91%	5806 / 6404	4
Measure 11	●	55	78%	1012 / 1292	4
Measure 12	●	15	14%	163 / 1292	4
Measure 13	●	92	93%	1196 / 1291	4
Measure 14	●	85	74%	1408 / 1899	0
Measure 15	●	95	98%	9437 / 9665	4
					Score
					48/60
Resource	Outcome	% Goal	% Actual	Num/Denom	Score
Measure 1	●	5	4%	2232 / 56854	5
Measure 2	●	25	23%	4724 / 20327	5
					Score
					10/10
MyChart	Outcome	% Goal	% Actual	Num/Denom	Score
Measure 1	●	50	66%	10060 / 15341	5
					Score
					5/5
Advancing Care Information					Score
					25.0/25
25 Maximum Achievable Points					
Required	Outcome	% Goal	% Actual	Num/Denom	Score
Measure 1	●	60	97%	39039 / 40169	10 (/ 4) 2.50
Measure 2	●	50	82%	642 / 781	19 (/ 4) 4.75
Measure 3	●	40	100%	22844 / 22880	20 (/ 4) 5.00
Measure 4	●				10 (/ 4) 2.50
Measure 5	●	0	40%	5963 / 14799	14 (/ 4) 3.50
Performance	Outcome	% Goal	% Actual	Num/Denom	Score
Measure 1	●				10 (/ 4) 2.50
Measure 2	●				7 (/ 4) 1.75
Measure 3	●				10 (/ 4) 2.50
Measure 4	●				2 (/ 4) 0.50
Measure 5	●				2 (/ 4) 0.50
Measure 6	●				6 (/ 4) 1.50

Scorecard - Department Summary			Score
Dept Panel Size	20,870	Quality	88/100
Avg HCC Addressed	0.32	Resource	Grade
Department ID	99999	MyChart	
		ACI	

Our ability to provide high quality care through the delivery of efficient, cost effective healthcare services, known as 'Value-Based Care', is increasingly important.



Sansum Enterprise Applications Team

Patient Experience

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Press Ganey Updates/
Employee Engagement Survey

Advanced Practice Providers

Prescription Navigator -
Rania Shenoda, PharmD

Brown Bag Medication
Review Program

Hospital and Skilled Nursing
Facility Discharge Medication
Review Program

Oncology Pharmacy Program

Medication Therapy
Management Program



Press Ganey Patient and Employee Experience Surveys - 2019 Goal Performance

Sansum Clinic is committed to transforming the care experience and delivering safe, high-quality, patient-centered care through continuous evolution of practices and processes to meet patient needs. Patient experience surveys administered through research partner Press Ganey enable us to gather comprehensive patient feedback to understand preferences, and accelerate improvement processes.

Sansum Clinic's Executive Team works with each department to create annual organizational goals to enhance performance in five key organizational pillars – **Patient Experience, Access to Care, Quality Benchmarking, Financial Health and People**. Progress is measured monthly through patient experience surveys and opportunities for process improvement are prioritized throughout the year.

In 2019, Sansum Clinic conducted its first organization-wide **Employee Engagement Survey** in which more than 700 staff members participated. The Human Resources Department then dedicated time to sharing survey results and conducting “Your Voice Matters” feedback sessions with departments throughout the organization. The survey was used to determine and recognize strengths and identify opportunities for improvement.

Advanced Practice Providers

Physician Assistants (PAs) and **Nurse Practitioners (NPs)** are medical professionals in a category known as **Advanced Practice Providers** or **APPs**. They are highly-skilled, versatile members of the medical team. They can evaluate and examine patients, order tests to determine a diagnosis or gauge symptoms, prescribe some medications, and assist in certain procedures. Having that extra layer of support means more patients can be treated in a timely manner. It lets the doctors focus on physician-only tasks and brings other highly-qualified, collaborative team members into the mix, especially helpful when additional opinions are needed on complicated cases. For many patients, the kind of care they receive from a PA or NP so closely mirrors seeing a doctor, the only hint of a difference may be the title monogrammed on their white lab coat.

Physician assistants enter **competitive Masters Degree programs** often after working in roles involving direct patient contact. Their rigorous education is modeled on medical school training and includes thousands of hours in extensive clinical rotations throughout various disciplines to round out their experience. The PA curriculum emphasizes treating the “*whole patient*” and includes coursework on patient education, preventive care, and chronic care management.



Advanced Practice Providers

Nurse practitioners are registered nurses who hold advanced degrees, either a master of science in nursing or doctor of nursing practice. Both physician assistants and nurse practitioners need national certification and state licensing. While the physician supply is growing slowly, around 1% annually when balanced out by retirement rates, the number of NPs and PAs is expected to increase nationally by **6.8%** and **4.3%**, according to a 2018 survey released by The Center for Interdisciplinary Health Workforce Studies at Montana State University, Dartmouth College Economics Department and the National Bureau of Economic Research.

At Sansum Clinic and around the country, the growing advanced practice provider population is filling a critical gap. Longer life spans and patients' improved access to healthcare through the Affordable Care Act translates into more people wanting personalized healthcare within a reasonable amount of time. At nearly 20 of Sansum Clinic's locations, more than 40 APPs are directly addressing this need. *"We have found that these dedicated and knowledgeable professionals are an integral part of the health care team,"* says **Marjorie Newman, MD**, Sansum Clinic Medical Director. *"We've increased the number of APPs over the past several years and not only have we been able to enhance access to care, but we have also found that patients are very appreciative of the additional time and attention that the APPs are able to provide."*

"Having Advanced Practice Providers on staff has allowed us to offer same-day appointments Monday through Friday, even during the busy winter months," explains **Mimosa Bitter, BSN, RN**, Urgent Care Manager. *"Without them, patients would wait longer and the physicians would quickly burn out."* Bitter looks constantly at the staffing grid to ensure the providers can treat the sickest patients quickly while still tending to the others without long wait times. Here, a team of nine PAs and three NPs speeds up the process without sacrificing quality patient care. They have extensive experience that allows them to see patients just like a doctor. They often are the ones who follow up with patients once they leave Urgent Care to discuss test results and treatment plans.

"Having Advanced Practice Providers on staff has allowed us to offer same-day appointments Monday through Friday, even during the busy winter months"

Many Sansum Clinic PAs and NPs have years of experience within their specialties. This gives them greater insight and clinical knowledge of specific conditions and helps them to build closer relationships with patients. *"In oncology, we get more face time with patients because of the frequency of visits. We really do get to know them,"* explains **Amanda Sweet, PA-C**, Oncology Physician Assistant at Ridley-Tree Cancer Center. *"With the scope of practice that we have, patients don't have to go through two or three different people in order to get action on what they need."* In addition to Urgent Care, and Oncology and Hematology, Sansum Clinic employs advanced practice providers in Internal Medicine, Family Practice, Obstetrics

and Gynecology, Cardiology, Orthopedics, Pediatrics, Endocrinology and the Anti-Coagulation Clinic.

Kara Jones is a family nurse practitioner in Sansum Clinic's Cardiology Department. She's worked exclusively in

cardiology for eleven years, the last four with her nationally-renowned heart team. Jones and a second nurse practitioner can evaluate symptomatic patients, saving them a trip to the emergency room. *"I let patients know that I work closely with our cardiologists and if I have questions or a patient wants me to review something with a doctor, I can do that,"* she says. Jones's team guides patients through various heart procedures, following them through their hospitalization and follow-up, so one consistent person is tracking their case.

Clinic physicians recognize the value of APPs as an extension of their care. They often introduce the APPs to patients to explain how they are integrated. Some patients who have already registered the value of these medical team members have selected their trusted APP as their primary healthcare professional. While some parts of the future healthcare landscape may be difficult to predict, it appears that APPs are likely to be a stable and constant presence at Sansum Clinic for a long time to come.

In 2019, Advanced Practice Providers cared for **41,090 individual patients** at **58,265 visits**.

Prescription Navigator - Rania Shenoda, PharmD

Sansum Clinic's innovative **Prescription Navigator Program** assisted 1,208 patients in managing medications and prescriptions in 2019. 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

Brown Bag Medication Review Program

In 2019, 113 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

In 2019, **Shenoda assisted 1,095 patients** who were discharged from the hospital or a skilled nursing facility. She contacted the patients or family members by telephone after discharge to conduct a comprehensive medication review and ensure they had 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.

Shenoda joined Sansum Clinic as our first Prescription Navigator in 2014.

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.

Oncology Pharmacy Program

Ridley-Tree Cancer Center at Sansum Clinic has incorporated the role of **Oncology Pharmacist** as an integral part of the cancer care team. **Estella Wu, PharmD, MS, BCPS**, now plays an important role in the delivery of care for cancer patients at all phases of their treatment; from assisting with writing chemotherapy orders, helping to build electronic health records, performing medication management, symptom management and providing supportive care.

Wu leads a team of **Admixture Technicians**, ensuring safety in the compounding and dispensing of chemotherapy, maintaining an adequate supply of medications, minimizing drug waste, and managing cost and reimbursement for cancer drugs. She also implements programs to ensure the safety of staff and patients during the receipt, preparation, administration, and monitoring of unnecessary exposure to hazardous anticancer drugs. In 2019, the Oncology Pharmacy treated **1,858 unique patients** at **13,749 infusion appointments** at Ridley-Tree Cancer Center.

Wu is positioned to be influential in the development of institutional evidence-based guidelines, policies, and standards because of the expert therapeutic and regulatory knowledge required as an oncology pharmacist. She participates on various committees as they discuss formulary management and treatment protocols to improve safety, efficacy, and compliance with regulations. As the care of cancer patients continues to be challenged with high-cost therapies, medication shortages, regulatory requirements and dwindling reimbursement, she is heavily relied upon to provide support for the clinical team in an effort to improve overall cancer care and patient quality of life.

Wu joined as the organization's first Oncology Pharmacist in 2017. She earned her PharmD from USC, and is a board-certified pharmacotherapy specialist. She has held clinical positions at Massachusetts General Hospital, Cedars-Sinai Medical Center and Santa Barbara Cottage Hospital.



Medication Therapy Management Program

While **Lily Yip's** impeccable credentials, education and board certification qualify her to work in nearly any pharmacy setting, she plays a different and unique clinician-type role at Sansum Clinic, created because of a critical need among diabetes patients. As a medication therapy management pharmacist, Yip cares for patients referred by Sansum's six endocrinologists and two certified physician assistants (PA-Cs). Many of these patients require more education and increased understanding of the prescriptions they take to maintain their health. *"The problem with diabetes is that it's almost like a silent disease,"* Yip explains. *"People say 'I feel fine. My doctor said my lab results were a little abnormal but I don't feel any different. I am not in pain, my vision is fine, my kidneys are fine, why should I worry?'"* And then five, ten years down the line, when they are hospitalized or they get sick, they say, *"I wish I started paying attention sooner."* As a certified diabetes educator, Yip is all too familiar with the depression, anxiety and guilt these patients can experience from the stresses of managing their disease. *"Often, they just don't want to admit they are not taking care of themselves,"* she notes. *"We don't want that for our patients. We want to empower them and let them know that there are resources here available to them."*

In 2019, Yip assisted **399 patients** at **910 meetings**, which are free to patients, at her Pesetas Clinic office. She reviews a patient's entire medical record and takes time to uncover important factors that might not have been shared with the physician. Yip says these talks reveal all kinds of 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. Yip works to bridge the gap between the patient and the medical team. She is fluent in English, Spanish and Chinese. *"I like having them come in person so I can get to know them and build that rapport,"* confirms Yip. *"You have to know what is going on in their life. You try to be their coach and guide*

them on what they can do. I tell them, I am not going to judge you. I will figure out how to help you and encourage you. I think that makes a big difference.” Armed with a doctorate from the University of Southern California School of Pharmacy and seven years experience working around Los Angeles in similar positions, Yip 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. *“It’s my background and my passion.”*



Lily Yip, PharmD, APh, CDE, BCACP

Yip first connected with Sansum Clinic when Medical Director **Dr. Marjorie Newman** contacted her to discuss the use of clinical pharmacists, something uncommon for independent organizations the size of Sansum Clinic. When the time came to create a position in Santa Barbara, Yip had just moved to Ventura County. *“My life motto is everything happens for a reason,”* she chuckles. Yip viewed Sansum Clinic as less-hospital centric than other places she’d worked and less bound by corporate red tape that can sometimes tie the hands of clinicians seeking to personalize care. *“It really felt like we had our own autonomy to customize and do what we think is right for the patient,”* she adds.

“It really felt like we had our own autonomy to customize and do what we think is right for the patient”

Volunteering at health fairs since high school, Yip enjoys the human interaction side of pharmacy. Her residency in ambulatory care at USC exposed her to another side of her field. She learned from her mentors the importance of being innovative and finding the needs within the medical group. *“Pharmacists can be a great asset to physicians and other professionals,”* she confirms. Hosting college interns in her current position helps her to dispel the notion that pharmacy is *“just about counting pills.”* She wants her students to see how rewarding it is to have a direct, positive impact on a patient’s health. *“That’s why I am here.”*

“To teach them so they understand what is going on in their body. If they start early enough, they can prevent progression of the disease. That really is the key. This is a disease they can control.”

Sansum Clinic Prescription Pharmacies

In 2019, Sansum Clinic Prescription Pharmacies at 317 W. Pueblo Street and 215 Pesetas Lane, under the leadership of **Stephanie Daughters, PharmD**, Director of Pharmacy, filled approximately **115,000 prescriptions** and administered **8,589 adult immunizations**.



Stephanie Daughters, PharmD

Medical Social Work Program

Care management ensures that care is provided to individuals as seamlessly as possible and minimizes the potential for duplication of services. 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.

In 2019, **Care Manager Christine Cruse, MSW, ASW assisted 482 patients at 758 appointments** in managing their health condition by helping them prioritize their healthcare needs and offering support in navigating an increasingly complex healthcare system.



Care Manager Christine Cruse, MSW, ASW

Sansum Clinic Deploys New Patient Engagement Tool



With more than 200 providers at 23 locations, Sansum Clinic needed an up-to-date patient engagement tool that gives staff the flexibility to coordinate timely communication with patients. Sansum sought a tool that would:

- Allow easy access to customize the wording of automated messages, including changing the times and dates when those messages went out.
- Have the ability to customize message timing and wording for each individual medical specialty.
- Have the capacity to send out a single reminder for complex, multi-part appointments.
- Have a two-way messaging system, so that patients could reply to medical staff about their scheduled appointments.

WELL’s text messaging platform proved to be a great fit. *“We liked the ability to work the program ourselves and make adjustments and changes in a timely manner, as needed,”* said **Betty Lee**, Director of Patient Access. *“We had more control over the product and what we send to our patients in a way that feels more personal.”* Patients now receive messages from the Sansum staff from the Clinic’s phone number, rather than from a random number.

Sansum Clinic piloted WELL at their most complex clinic: Foothill, which had 41 providers in seven specialties. If it could work there, they reasoned, it would work anywhere.

And it worked. Within three months of introducing WELL, the **no-show rate at Foothill dropped 19%, and the percentage of patients who confirmed their appointments rose from 8.79% to 32.47%—an increase of 269%. The number of calls per patient visit decreased by 25%** in every department. Medical staff



Betty Lee

found that they had more time to do their jobs. *“The project proved itself,”* said Lee. Both staff and patients were reporting that they loved the convenience and effectiveness of WELL.

Within just a month of going live, Sansum’s leaders decided to extend their use of WELL throughout the Clinic system. Enthusiastic staff members were instrumental in teaching their colleagues to use WELL’s platform. *“Being able to leverage the staff as champions and cheerleaders has really helped,”* said **Karen Handy**, Vice President of Operations. *“The positive reinforcement they hear back from patients when they send selfies or emojis, that’s really nice for them.”*

WELL met Sansum’s needs for flexibility and improved its metrics, and it also offered the Clinic more intangible benefits: Sansum captured a better sense of their patients’ experience at the Clinic, whether positive or negative. *“This was a*

way for the patients to tell us ‘We really enjoyed coming to you’ and ‘Thank you for being there,’” said Lee. But even when a patient isn’t satisfied, *“they can text to easily tell us about their experience, and we can respond in a timely manner.”*

“The positive reinforcement they hear back from patients when they send selfies or emojis, that’s really nice for them.”

Other business benefits of this technology include adjusting the time frame and wording of messages to keep cancelled appointment slots from going unused. WELL is also used to collect insurance cards and patient data. *“We can create broadcast messages to make sure our staff have everything they need before the patient walks in the door,”* Lee said. And finally, Sansum can send broadcast messages to make sure pre-op patients are clear on their instructions and have asked any questions they have in advance of their surgery or procedure.



Culture of Collaboration

3

Coastal One Health Partners

Integrated Approach to
Oncology Care

Ridley-Tree Cancer Center
2019 Highlights

Santa Barbara Neighborhood
Clinics

SEE International

Doctors Without Walls/Santa
Barbara Street Medicine

WE CARE Year in Review

We Care in Six Words
Contest Winners





coastal **one**
health partners

Coastal One Health Partners

2019 saw the successful completion of our second year of participation in **Coastal One Health Partners (COHP), a Track 1+ Medicare Shared Savings Program accountable care organization (ACO)**. Sansum Clinic and Cottage Health partner in the ACO to enhance the care and services provided to our Medicare fee for service population. 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).

In this second year of this 3 year program, the ACO demonstrated high clinical quality scores. Patient experience surveys as well as cost and utilization trends within the ACO revealed opportunities for improvement with respect to the patient experience and healthcare resource utilization within our community. The collaboration resulting from the COHP workgroups, which crosses the continuum of care from in-patient to out-patient and skilled nursing facility, benefits our community by facilitating our ability to take action on opportunities for improvement revealed through performance trends seen in 2019.





Integrated Approach to Oncology Care

Ridley-Tree Cancer Center takes a multidisciplinary approach to cancer care where highly-trained physicians and staff utilize the latest technology, treatment protocols and clinical trials to give patients every opportunity for a successful outcome. This method also includes research-based supportive care and wellness programs that are proven to lead to better healing and recovery. All of the people and parts of this critical process are housed in our flagship building in Santa Barbara, with an additional location in Solvang, and the Nuclear Medicine Department located within Santa Barbara’s Cottage Hospital, which allow us to provide all patients in Santa Barbara County access to the myriad services we offer, close to home.

Partnering for Excellence in Cancer Care

Ridley-Tree Cancer Center collaborates with many providers from the broader community to facilitate seamless, high quality and multi-disciplinary care for all cancer patients in our area. Our partnerships center on five **Multidisciplinary Tumor Board Conferences** where community specialists from surgery, medical oncology, radiation oncology, radiology, pathology, genetics and research examine a patient’s condition to determine the optimal treatment plan. Through this integrated approach, patients benefit from the collective knowledge of Santa Barbara County’s diverse team of cancer experts.



Multidisciplinary Tumor Board Conferences:

- Breast Cancer
- Gastrointestinal Cancer
- Gynecological Cancer
- Neurological Cancer
- Consultative Cancer (other)

Ridley-Tree Cancer Center at Sansum Clinic

2019 Highlights

Sansum's first fellowship-trained breast surgeon, **Katrina Mitchell, MD, IBCLC, FACS**, joined **Rosa Choi, MD, FACS** to expand the **Breast Surgery Program**. Dr. Mitchell adds specialization in pregnancy and postpartum breast cancer and maternal complications of lactation.



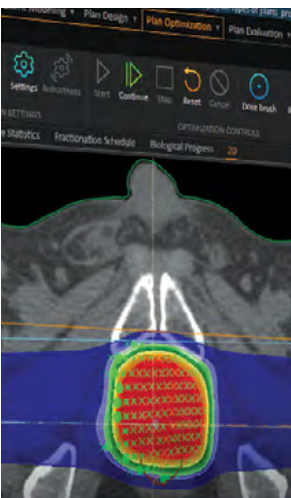
The **Gastrointestinal (GI) Cancer Program** earned high-volume pancreatic surgery status from **The Leapfrog Group**, driven by surgical oncologist **W. Charles Conway, MD, FACS**. **Cristina Harnsberger, MD, FACS**, joined the GI surgery team bringing additional fellowship training and expertise in colorectal surgery.



Sansum Clinic's Palliative Care and Advance Care Planning Program was launched in 2019 based at Ridley-Tree Cancer Center, and made possible through generous support from J.S. Bower Foundation, William Williams, Natalie Orfalea Foundation and Lou Buglioli, Lady Leslie Ridley-Tree, Benjamin Wayne and Valerie Mizuhara, Warren and Mary Lynn Staley and Hollye and Jeff Jacobs. Led by **Deborah Meyers, MD**, the team works to ensure patients with serious illness understand their diagnoses, and create individualized plans for patients to improve quality of life, alleviate suffering and provide extra support.



The **Radiation Oncology** team acquired the **RayStation treatment planning system**, a sophisticated software tool that optimizes the power of our linear accelerators by targeting and treating cancer in a more efficient and precise way. This heightens the caliber of care confirmed by our accreditation from **American Society for Radiation Oncology (ASTRO)** as an **Accredited Program for Excellence (APEX)**.



To meet the growing need for cancer care in mid-Santa Barbara County, we welcomed medical oncologist **Eric Bank, MD** who serves patients at our Solvang location. We also expanded the facility to create office space for authorization, nutrition and social work staff members.



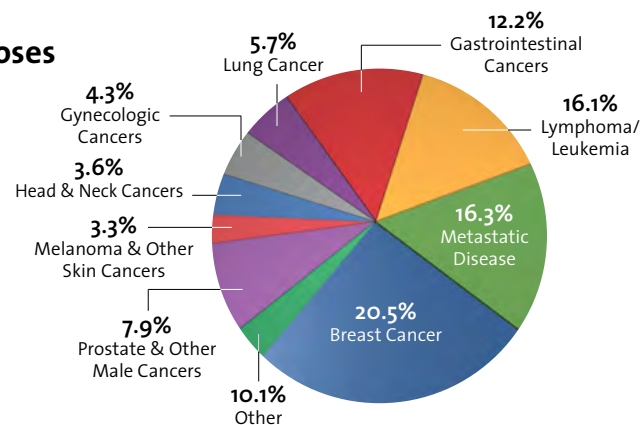
The **Santa Barbara Breast Care Alliance**, our local 'breast center without walls,' achieved re-certification from the **National Accreditation Program for Breast Centers (NAPBC)**, marking the 11th year as the only NAPBC-accredited team in the region providing comprehensive and high-quality care for breast cancer patients.



Ridley-Tree Cancer Center hosted four **Community Lectures and Training Center** with more than **207 guests** in attendance. The lecture series aims to inform and educate the community on relevant topics related to cancer care and prevention, such as Medical Cannabis and Cancer, Improving Outcomes from Colorectal Cancer, Stress and Cancer, and Genetic Counseling and Hereditary Cancer.



Top Diagnoses



11,982

Unique cancer patients treated

68,674

Visits to our oncology departments

65

Average age

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.

Santa Barbara Neighborhood Clinics



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 provides care to 1 in 10 people in the community and they’ve been serving the community for over 45 years. **Over 22,000 patients** are cared for at four medical clinics, two dental clinics, an integrated care clinic and health promotion services.

Since 2010 Sansum Clinic has provided **6,203 SBNC patients with 7,604 diagnostic services totaling over \$3.1 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, ultrasounds and mammograms.

In 2019, Sansum Clinic reinstated the colonoscopy screening program in partnership with the Cancer Foundation of Santa Barbara and screened **32 patients**. One patient, a 64 year old man, was diagnosed with colon cancer and he’s doing well following surgery.

SEE International



In 2019 Sansum Clinic partnered with **SEE International’s Santa Barbara Vision Care Program** to provide eye care services, at no cost, to patients of SEE who have no health insurance. Sansum Clinic’s ophthalmology physicians and medical staff provided eye care to **41 patients with 250 services**. Eighty percent of all visual impairment can be prevented or cured, adequate vision care can make a remarkable impact on a person’s well-being.

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 inhibit 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. Many Sansum physicians and staff members volunteer their time which allows DWW-SBSM to expand their reach within the community. In 2019, DWW-SBSM served **3,902 clients** (socks, shampoo, toothbrushes and medical care).



WE CARE Year in Review

2019 was the Clinic's first full year implementing the **WE CARE** communications and customer service

framework, which is now being carried out in countless ways at all of our sites. The WE CARE framework is included in all job descriptions, the Clinic's new employee evaluation tool, and the annual employee review process. Throughout the year, WE CARE communications included an "Ask/Share" model, in which we deepened our understanding of the WE CARE philosophy and framework by asking about internal best-practices and then sharing them throughout the entire organization.

In January and February, the Clinic focused on ways to **Welcome patients and colleagues warmly and sincerely**. For the first Clinic-wide WE CARE Challenge, we asked staff to submit a short video about what WE CARE means to you and/or your teams. Members of the Ophthalmology team were recognized for submitting a clever video showing how they embody WE CARE on a daily basis. Doctors' Weight Management Program's **Donna Gill, Alysha Izoco and Ilana Zago** were also recognized for submitting strong examples of how they welcome patients and colleagues to their department. All of these employees, and the subsequent winners throughout the year, were recipients of a soft, plush WE CARE blanket.

Every year during the holidays Sansum Clinic sets up boxes in the facilities to collect socks for the DWW-SBSM volunteers. Men's white athletic socks are one of the most valuable pieces of clothing to people without permanent housing. Feet work overtime when there's no warm home to return to each night, and a new pair of socks is greatly appreciated and welcomed by the homeless.

We would like to acknowledge the following physicians and staff who graciously volunteer their time to Doctors Without Walls/Santa Barbara Street Medicine:

Julia Becca, RN	Lynn Matis, LMFT (retired)
Colton Betts	Ashley McGrogan, PA-C
Laurel Bliss, MD	Dave Phreaner, MD
Lindsay Katona, MD	Ivan Rodriguez
Kati Kenner, PA	Berenice Ruvalcaba
Marie Claire Lamb, MD	Bret Simon, OD
Alex Leasure, MD	John Vallee, MD (retired)
Aaron Lewis	Nicole Yang

Other Partnerships

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

- Alzheimer's Association
- American Heart Association
- Arthritis Foundation
- Cottage Health
- Jodi House
- Santa Barbara Neighborhood Clinic's Healthcare Heroes
- WEB (Welcome Every Baby)





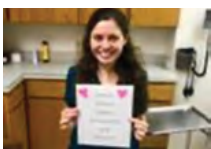
In April and May, focus shifted to how we **E**ngage **wholeheartedly** as an organization to ensure we have meaningful communication with our patients and staff at every interaction. **Glenna Verdugo**, RN Manager at Pueblo ASC & GI Department, received special recognition for sharing the creative ways in which her team embodies **WE CARE**.



May and June were dedicated to ensuring all staff know the expectations for, and have the tools to **C**ommunicate the **plan**. **Alicia Calderon**, Authorization Specialist at Ridley-Tree Cancer Center was recognized for her artistic demonstration of **WE CARE**.



Asking questions to deepen understanding was the focus for July and August. **Solvang Country Clinic** office staff was recognized for using visual signals to communicate the plan with each other.



The Clinic-wide challenge during this period was a **WE CARE 6 Words Contest**. **Jessica Cooney**, LVN at Goleta Family Practice and **Cynthia Chavez Gradilla**, medical insurance biller at Corporate were recognized for being the first two people out of 150 people who made submissions for the contest.



We dedicated September and October to **R**eassuring **patients and colleagues that we have their best interests in mind**. During that time, **Nanette Halasz**, RN Specialist at Foothill Urology, was recognized for the detailed submission outlining her team's **WE CARE** practices.



In November and December, focus shifted to how we **E**xit all **interactions with appreciation and thanks**. **Terri Salazar**, Support Analyst PMS Systems, Duplicate Resolution Coordinator in the IT Department at 89 S. Patterson Avenue, was recognized for



submitting this valuable method for **exiting with appreciation and thanks**:

*“I always try to give what I call **The Sandwich**, which is starting with a positive and ending with a positive. I usually start by thanking patients for whatever their question or problem is, such as, ‘Thank you for allowing me to help you with this issue.’ Then I end with appreciation by saying something like, ‘Thank you again, and have a great day!’ When dealing with a coworker, if they respond with a thank you also, I will respond back with ‘Together we are a team.’”*

Sansum Clinic staff of **1,200 people** benefitted by learning from each other throughout the year. All training elements were summarized in a **WE CARE** e-Book that was distributed to all staff and physicians and can be easily accessed on the Clinic’s intranet.

We Care in Six Words Contest

More than 150 staff and physicians participated in the **WE CARE Six Words** contest, in which they submitted a six-word answer to the question, “What does **WE CARE** mean to you?” Winners were selected through a Clinic-wide vote.

TOP 5 WINNERS RECEIVED A GIFT CERTIFICATE

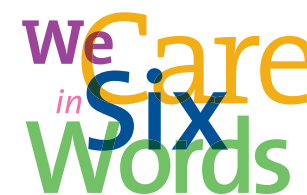
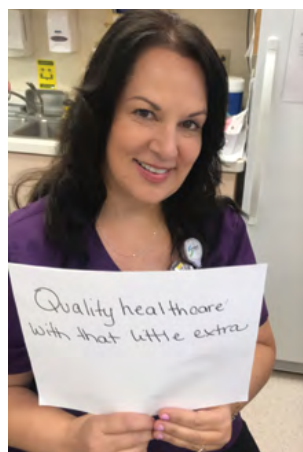
Sansum is Home – Patients are Family **Amy Barbabella**, Optometry

Patient Care Starts with a Smile **Catherine Miles**, Endocrinology

Caring and Compassion – Our Strongest Medicine! **Frances Brantingham**, Radiology (pictured below left)

Be Patient, Be Present, Be Proactive **Colton Betts**, Oncology Research

Ask Me, I’m Here for You **Elizabeth Hernandez**, Patient Access (pictured below right)



Sansum Clinic would like to recognize our 2019 WE CARE Champions

WE CARE CHAMPIONS ARE HONORED FOR OUTSTANDING SERVICE AND COMMITMENT TO OUR MISSION TO PROVIDE AN EXCELLENT HEALTHCARE EXPERIENCE, RECOGNIZING THAT OUR FIRST PRIORITY IS THE PATIENTS WE SERVE.



Kristen Adams
Alma Aguilera
Monique Aguilar
Laura Albrecht
Dr. Tom Anderson, Jr.
Christine Aponte
Erika Arce
Julie Archila
Patricia Arzate
Juli Askew
Victoria Atkinson
Amy Barbabella
Tracy Battle
Aurora Bejar
Angela Bermudez
Jennifer Blankenbeckler
Anna Bordofsky
Casey Brady
Jordan Branch
Cecile Brown
Brenda Bueno
Belinda Burns
Paola Cano
Victor Carrasco
Victoria Carrasco Tamallo
Melissa Carrillo
Jennifer Castro

Cecily Chavez
Lark Cobb
Jessica Cooney
Tricia Corman
Corinna Polly Cortez
Lindsay Cortina
Elva Cosio
Dr. Shane Cotter
Carlos Covarrubias
Sheena Cruse
Elizabeth Cuevas
Gary Cummings
Tara Cunningham
Ryan Dagna
Fran Daniels
Stephanie Daughters
Paulette Davis
Ofelia De Gracia
Diana Delgadillo
Nicole DeMarco
Rita Desales
Sherri Diaz
Dick Drew
Bryanna Ehli
Paulette Enriquez
Jessica Fabing
Jill Fonte

Mary Fox
Rick Gabbie
Maria Galindo
Deanna Garner
Laura Garnica
Roy Gillman
Tina Gillman
Jannele Gonzales
Dr. Liana Gonzalez
Vilma Gonzalez
Mel Gonzalez
Katherine Good
Jared Gorter
Sheryl Grace
Maria Guerra
Noelia Guerrero
Daisy Gutierrez
Leticia Gutierrez
Jordan Guzman
Penny Hamilton
Rebecca Hammel
Dru A. Hartley
Shiva Hejazi
Jasmine Hernandez
Matt Hersey
Cindy Hilley
Marilyn Hodgkin

Andrea Hodosy
Tommy Holguin
Sam Howland
Jre Hunter
Ryna Jackson
Joey Jaramillo
Carmela Jasso
Lydia Jimenez
Vicky Jimenez
Nolan Johnson
Randy Kilbourn
Laura Landeros
Martha Larin
Betty Lee
Frank Leever
Kitty Leite
Mayra Leon
Lidia Lombardi
Laura Lopez
Francisco Maldonado
Maria Martinez
Natalie Martinez
Robert Martinez
Sherry Massey
Marielle Matgen
Kari McCluskey
Jerma Menders

Aaron Mendoza
Danny Meza
Richard Morgan
Cynthia Moxley
Julieta Moya
Robert Murphy
Louis Nevarez
Dr. William Kiernan O'Callaghan
Lucy Olivera
Alberto Ortega
Brittany Paris
Hank Peterson
Joe Petrie
Dr. David Phreaner
Sandra Pizano
America Preciado
Karen Rabago
Ruth Ramirez
Jhoanna Ramirez
Jessica Ramos
Veronica Rea
Bill Read
Karen Reveles
Suzanne Richardson
Twilight Robin
Ana Rodriguez

Christina Rodriguez
Jennie Rodriguez
Monica Rodriguez
Connie Rojas
Cheryl Rosales
Jamee Sakai
Maria Sanchez
Marisol Segura
Charlotte Sell
Brooke Sharp
Mallory Silva
Mayra Solano
Mary Solis
Megan Thomas
Vanessa Valadez
Pieter VanZyl
Valeria Vazquez
Alby Vega
Lucia Viramontes
Margaret Weiss
Lori Wells
Anais Williams
Ryan Wipf
Wendy Wright
May Xiong
Jeremy Zolnoorian

Education & Outreach

4

- Health Education Annual Report
- Additional Activities and Accomplishments
- Camp Wheez
- Spring Into Good Health
- Sansum Clinic Women's Health Initiative
- Visiting Professor of Surgery 2019



2019 Health Education Annual Report

The purpose of **Health & Wellness** is to improve 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 & Wellness facilitates the physicians' ability to provide quality care by delivering the education and support components and provides a significant community service, offering many programs that are open to the community for a nominal fee or free of charge. Health & Wellness supports initiatives such as Patient Centered Medical Home, Pay for Performance, Physician Quality Reporting System and Population Health Management.

SERVICES PROVIDED

In 2019 Health & Wellness provided services to approximately **9,000 people** as follows:

- **Advance Care Planning (ACP)** was a focus area with a communication and outreach campaign directed to the community and a special campaign and event series directed to employees. This increased visibility coincided with an increase in the number of ACP documents filed. In the 3 previous years (2016, 2017, 2018) the average number of documents filed was 1,364 per year. In 2019, **1,587 documents were filed, an increase of 14%**.
- Individual professional consultations were provided in the areas of advance care planning, care management, diabetes and nutrition to **4,300 people**.
- Group education and support programs were provided in **22 topic areas to 1,700 participants**.
- Health Resource Center (HRC) provided information to approximately **2,400 people**, an **increase of 38%** from 2018. The most frequent reason for a visit was Advance Care Planning. HRC served as the hub for assistance with Advance Directives and this is the primary reason for the increase in the number of visitors.
- Community-based health events provided resources to **600 people**.
- Staff provided **30 hours of in-kind services** to community health improvement committees and events.

Health Education Group Programs

Advance Directives Employee Events
 Advance Directives Notary
 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
 Doctors' Weight Management Program Orientation
 Gestational Diabetes
 HEAL: Healthy Eating Active Living
 Medicare Workshop
 Neck & Posture Wellness
 Notary for Advance Directives
 Nutrition Navigator
 Stress Management
 Understanding Dementia
 Using MyChart - NEW
 WomenHeart Support Group
 Yoga 101
 Your Healthy Pregnancy

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
 Nicole Almanza, MPH, RDN, CDE
 Alzheimer's Association
 Christina Archer, MS, RDN
 Diana Bullock, RN, CDE
 Jayne Brechwald
 Jinny Chang, MD
 Julia Chang, RN
 Elizabeth Coker, PT
 Cottage Health Respiratory Therapy
 Christine Cruse, MSW
 Meghan Dewey
 Lillie Donner, PT
 Victoria Eng, MD
 Gerri French, MS, RDN, CDE
 Abby Galler, RN
 Donna Gill
 HICAP (Health Insurance Counseling and Advocacy Program)
 Sheryl King, PT
 Myron Liebhaber, MD
 Saiping Lin
 Amy Lopez, MSW
 Laura Mancuso, MS, CRC
 Julie McGovern
 Marilyn Mendoza, MD
 Suzanne Michaud, MPH
 Sheila Millington
 Luciana Mitzkun-Weston
 Casey Rives, MD
 Amy Shapton, MSW
 Herm Trabbic
 Amy VanHarn, MS, RN, CDE
 Joe Wheatley
 Jay Winner, MD
 WomenHeart
 Lorraine Woodwark
 Marc Zerey, MD

Health Education Classes



ADVANCE DIRECTIVE WORKSHOP



BACK & NECK POSTURE WELLNESS



BALANCE & MOBILITY TRAINING



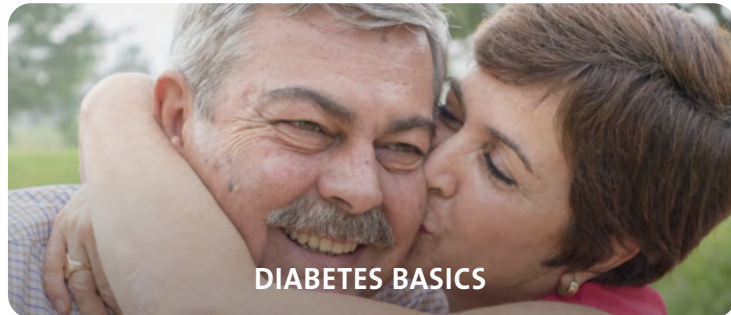
BARIATRIC SURGERY
ORIENTATION SEMINAR



BARIATRIC SURGERY SUPPORT GROUP



UNDERSTANDING DEMENTIA



DIABETES BASICS



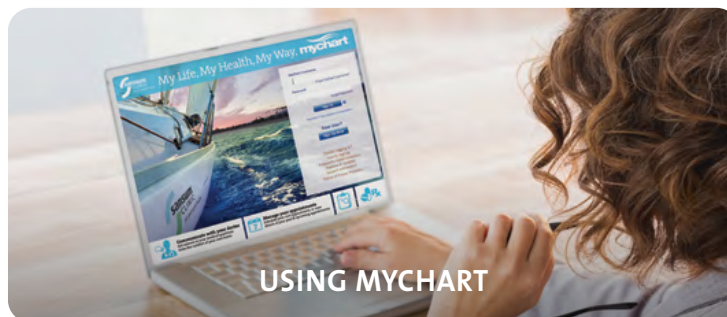
CAMP WHEEZ



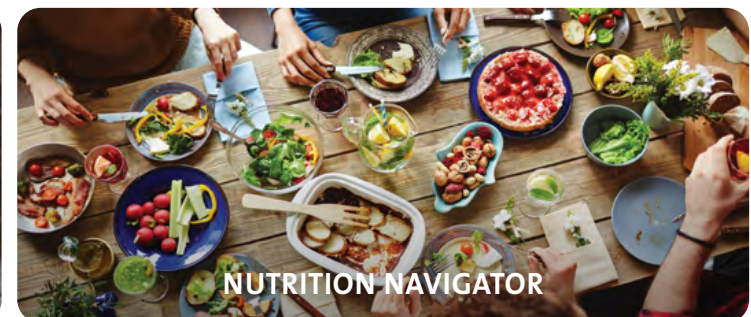
HEALTH EATING ACTIVE LIVING – KIDS



NEW TO MEDICARE



USING MYCHART



NUTRITION NAVIGATOR



STRESS MANAGEMENT



WOMENHEART



YOGA 101

Additional Activities and Accomplishments:

- **Camp Wheez** was fully funded by donations and grants. It continued to be free of charge and open to the community.
- **Diabetes Education** adopted new materials and a new format to fit with current billing and compliance guidelines, resulting in more education opportunities that are free of charge.
- **Healthy People Healthy Trails** continued to be a major community initiative with Sansum Clinic leadership and support.
- **Nutrition Services added HEAL – Healthy Eating Active Living**, a new program to address needs of patients with pre-diabetes or those who are overweight. The program is multi-session and rooted in evidence-based materials from the Centers for Disease Control.
- **Program satisfaction score**, as indicated by program participants, was high at **4.7 on a scale of 1 to 5**.
- **Program fee donations** totaled **\$4,200**.
- **Partnerships with community organizations** allowed for enhanced program offerings. Partners providing programs included Alliance for Living and Dying Well, Alzheimer’s Association, HICAP (Health Insurance Counseling and Advocacy Program) and WomenHeart.
- **Participation in community activities and committees** enhanced visibility for our programs and provided a community benefit. We participated with Adult and Aging Network, Alliance for Living and Dying Well, American Heart Association, COAST (Coalition for Sustainable Transportation), Elder Abuse Prevention Network, Santa Barbara Senior Expo and Weight Loss Surgery Foundation of America.

Camp Wheez

Camp Wheez is a day camp for children in grades 1 through 6 with asthma. They enjoy a camp experience designed for their special needs and learn about their asthma while participating in games and recreation, arts and crafts, and good old-fashioned camp fun! Founded by **Myron Liebhaber**, MD in 1978 in partnership with the American Lung Association, Camp Wheez is held every summer, free of charge and open to the community.

In 2019, 50 Camp Wheez kids, 15 high school aged counselors and many volunteers experienced a dinosaur world. They made dinosaur eggs for snacks, dinosaur silhouette artwork and did dinosaur drumming. A highlight was a visit from **Grayson Kent**, Paleontologist, who shared dinosaur and reptile fossils as well as his collection of living reptiles. How many kids does it take to hold up a giant living cobra? Eight kids at Camp Wheez!

At Camp Wheez the children also learned about their asthma. They inflated real pig lungs to better understand the respiratory system and played Jeopardy, Wheel of Fortunate and participated in a spelling bee – all with an asthma theme. In addition, the children had an opportunity to be part of a research study to better understand the impact of asthma education on airway inflammation. As part of the study, campers did a non-invasive pulmonary function test called FeNO on day 1 (baseline) and day 5 (end of Camp). The test involves blowing into a device that measures Exhaled Nitric Oxide, a marker of airway inflammation. In 2018 children with a low or intermediate FeNO, indicating low or intermediate inflammation, remained approximately the same over the week. Children with a high baseline, indicating high inflammation and high risk of asthma exacerbation, showed a 10% improvement by the end of camp. Dr. Liebhaber remarked that *“this allowed us to directly confirm that the Camp Wheez experience has a direct effect on asthma control.”* This study was published and repeated at Camp Wheez in 2019. Once again, the results look promising!



The fun, learning and science of Camp Wheez are made possible by the generous support of many community members and organizations including:

- | | |
|----------------------------|-------------------------------------|
| Julia Chang, RN | Deborah L. Reber |
| Mr. and Mrs. Jeffrey Clark | Casey Rives, MD |
| Jim and Peggie Cox | Michael and Rania Shenoda |
| Victoria Eng, MD | Boys & Girls Club of Santa Barbara |
| Robert Fry, MD | CenCal Health |
| Gail M. Grant | Santa Barbara Neighborhood Clinics |
| Karen Johnson, MD | Cottage Health Respiratory Therapy |
| Ernest Kolendrianos, MD | Easy Lift |
| Myron Liebhaber, MD | Swanton Foundation |
| John Motola, PT | Veronica Springs Church |
| Geary and Tina Olivera | And many, many community volunteers |

Spring Into Good Health

“We’ve come a long way baby,” announced Sansum Clinic Medical Director Dr. **Marjorie Newman** as she opened the **Spring Into Good Health** event hosted by the Women’s Council of Sansum Clinic. Dr. Newman praised the organization’s achievement in **increasing the percentage of female physicians from 20% in 2000 to 42% currently** and noted that the push into specialties traditionally dominated by male providers deserved special attention. “I am thrilled,” she expressed. “I do a lot of the recruiting and I have seen the trajectory. More women are going to medical school and they are finding mentors in fields not typically in the purview of female physicians.” Dr. Newman moderated a panel of six female doctors who discussed the latest advancements in their fields. Afterwards, they took questions from the audience.

Ophthalmologist **Dr. Toni Meyers** described the micro-invasive glaucoma surgery she performs and how it offers relief for her patients troubled by increasing eye pressure.



Camp Wheez

Breast Surgeon **Dr. Rosa Choi, MD, FACS** clarified how women not designated as “high risk” should begin mammography screening annually at age 40, aligning with recommendations from the American Society of Breast Surgeons.

Dr. Alexandra Rogers, the only female fellowship-trained urologist in the Santa Barbara area, relayed how many of her female patients with overactive bladders cannot find a truly effective remedy. For this reason, she’s enrolled 26 patients in a clinical trial for the eCoin device which combats unpleasant symptoms by stimulating the tibial nerve in the lower leg.

Infectious Disease expert **Dr. Mary-Louise Scully**, who also runs the Travel & Tropical Medicine Center, highlighted the rise of “superbugs” or multi-drug resistant bacteria (MDR.) These bugs are a global challenge plaguing humans and animals, making physicians rethink how they prescribe antibiotics, according to Dr. Scully.

Obstetrician and Gynecologist **Dr. Heather Terbell** stressed the importance of HPV

vaccinations for teens to help protect against types of the virus that lead to cervical cancer.

Oculoplastic Surgeon **Dr. Mica Bergman** outlined the kinds of procedures she performs for eyelid drooping and how her fast-growing specialty is improving patients’ vision and appearance.

Before the panel discussion at **Ridley-Tree Cancer Center**, guests enjoyed refreshments and a lobby performance by Music Therapist **Saiping Lin, MS, MT-BC**. Following the physician discussion, afternoon tea began in the Healing Garden where attendees could converse

with the doctors and meet local medical professionals. Representatives from many Sansum Clinic and Ridley-Tree Cancer Center departments and programs of special interest to women, including the **Doctors’ Weight Management Program, Cardiology, Facial Plastic & Reconstructive Surgery, Genetic Counseling, Health Education and Nutrition, Mindful Eating and Prescription Navigation**, gathered on the patio to explain their services and specialties. “I love that women are taking charge of their health,” commented **Donna Gill**, Manager of Doctors’ Weight Management Program. “This does feel less clinical and more like a conversation.”

Many participants appreciated that the female-focused dialogue was on target with subjects they wanted to know about. “This was outstanding in every way,” mentioned **Maryan Schall**, Sansum Clinic Honorary Trustee. “It was beautifully prepared and we all came away enriched.” Other women liked the chance to visit with the physicians and have their concerns heard in a more casual setting. “This was nice to interact one-on-one,” said guest **Charlene Daly**. “Women are the caretakers of our society and to come together is empowering,” added Dr. Terbell. “I hope we addressed things that might be uncomfortable for people to ask.”

The **Spring Into Good Health** event was organized by **Julie Nadel** and **Bobbie Rosenblatt** of the Women’s Council who frequently donate their time to help educate the community about timely health issues. The program was generously underwritten by title sponsor **Southern California Reproductive Center** and supporting sponsors **Montecito Bank & Trust, Waiakea Hawaiian Volcanic Water** and **Rincon Events**.

Spring Into Good Health with the Women’s Council of Sansum Clinic



Julie Nadel (in pink scarf), cofounder of the Women’s Council of Sansum Clinic, pictured with Spring Into Good Health speakers (L to R) Drs. Alexandra Rogers, Rosa Choi, Toni Meyers, Heather Terbell, Mary-Louise Scully, Marjorie Newman, Mica Bergman

Sansum Clinic Women's Health Initiative

Following the success of the Spring into Good Health event for women by women Sansum Clinic launched the **Women's Health Initiative**. The Initiative is dedicated to supporting educational forums for women, as well as purchasing state-of-the-art medical equipment and providing unique services directed specifically at enhancing women's health.

Sansum Clinic provides medical care to **124,162** patients at **800,123** visits and **56% of those patients are female**.

Gifts of support for the Women's Health Initiative have enabled Sansum Clinic to purchase an additional **3-D Mammogram Machine** to supplement the two 3-D machines currently in operation. Always in high demand, these machines provide greater accuracy, earlier detection, decreased recall rates and improved patient experiences when compared to earlier mammography equipment.

The **Women's Health Initiative** made a grant to **WEB (Welcome Every Baby)**, a personalized home visitation program for newborns and their families in Santa Barbara County.

For information on the Women's Health Initiative please contact **Dru A. Hartley**, Director of Philanthropy, at **805-681-7726** or dhartley@sansumclinic.org.



Visiting Professor of Surgery 2019

Dr. David V. Feliciano, from the **University of Maryland Medical Center**, was the **Visiting Professor of Surgery for Surgical Academic Week** (March 18-22).



Dr. Feliciano received his medical degree in 1970 from Georgetown University in Washington, D.C. He completed training in general surgery at the Mayo Clinic, in trauma at Wayne State University, and in vascular surgery at Baylor College of Medicine and was a Lieutenant in the U.S. Navy Medical Corps. He was Professor of Surgery at Emory University and Surgeon-in-Chief at Grady Memorial Hospital in Atlanta, Georgia from 1991 to 2011. After serving as the Battersby Professor of Surgery and Chief of the Division of General Surgery at Indiana University from 2013-2017, he is now a Clinical Professor of Surgery at the University of Maryland and an Attending Surgeon at The Shock Trauma Center/University of Maryland Medical Center, Baltimore. Also, he is a Clinical Professor of Surgery, Mercer University School of Medicine, Macon, Ga., and Adjunct Professor of Surgery, Uniformed Services University of the Health Sciences, Bethesda, Md. He is a general surgeon with strong interests in endocrine surgery, surgical oncology, and trauma. His research interests are use of ultrasound in truncal trauma; damage control celiotomy; and effect of metabolic state on outcome from vascular injuries. In addition, he is the Co-Editor of the textbook TRAUMA, now in its Eighth Edition.

Dr. Feliciano presented a public lecture on, "*Everything You Wanted to Know about Trauma in the United States*," at the Ridley-Tree Cancer Center at Sansum Clinic.

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.

Dr. Feliciano follows seven 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** (Houston Methodist Hospital), **Professor O. James Garden** (University of Edinburgh) 2018.

Dr. William Charles Conway took over the reins of the Visiting Professor of Surgery Education Program from **Dr. Ronald G. Latimer**, who established the program in 2010 with the Department of Surgery and Sansum Clinic. Sansum Clinic's Visiting Professor of Surgery program provides expert educational seminars for practicing Santa Barbara surgeons and physicians. More importantly, the program 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. Conway joined Sansum Clinic in 2017, and is a fellowship-trained surgical oncologist at the Ridley-Tree Cancer Center, with nearly 10 years of high-volume surgical experience dealing with complex cases.



Drs. Ron Latimer, Chuck Conway, David Feliciano and Kurt Ransohoff

Awards & Recognition

5

McNamara Fund for Professional
Enrichment and Education and
Nursing Scholarship Recipients

Dr. Erno S. Daniel Legacy Award

Medicare Advantage Stars
Recognize High-Performing
California Physician Organizations

Target BP Program

Sansum Clinic Awarded APG
Elite Status

Media Awards



McNamara Fund for Professional Enrichment and Education and Nursing 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.

Eleven 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.

MCNAMARA FUND FOR PROFESSIONAL ENRICHMENT AND EDUCATION RECIPIENTS

Octavio Avila, Center Support Technician, Foothill ASC (joined Sansum Clinic in 2007)

“Now, fresh off my 12th year at Sansum Clinic, I find myself at a crossroads. I’m eager to further my education and a grant from the McNamara Fund will allow me to attend the nursing program at Santa Barbara City College. I hope to be a greater asset and more valuable member of our team.”

Stefanie Christopher, Nuclear Medicine Technologist, Nuclear Medicine (joined Sansum Clinic in 2017) *“Every year the Society of Nuclear Medicine and Molecular Imaging hosts an annual meeting that takes place over a four-day period and*



Front row: Chris McNamara and Dr. Jim McNamara.

Back row from left to right: Michelle Viale, Maricela Hurtado Salinas, Amanda McFee, Stefanie Christopher, Kelsey Halterman, Octavio Avila, Rebecca Ogletree, Kristen DeHahn, and Jasmine Pizano.

provides professionals in the field of nuclear medicine an in-depth view of the latest developments in the field. The McNamara grant will allow me to attend the meeting and acquire new techniques and learn new protocols to improve image quality on scans we currently perform on a daily basis. It will also enable me to learn about our new and upcoming diagnostic imaging and therapeutic agents, and view technologically advanced instrumentation emerging in today's market."

Kelsey Halterman, MSC Supervisor, Patient Access (joined Sansum Clinic in 2014)

"When I started at Sansum Clinic I had no experience in healthcare or an office setting. Through an excellent training program and a lot of help along the way I was able to start helping patients schedule appointments and connect with their providers. In order to expand my knowledge I am interested in pursuing a BS in Health Administration."

Maricela Hurtado Salinas, Clinical Resource RN, Specialist, Pesetas Urgent Care (joined Sansum Clinic in 2016) *"The emergency nurse certification will enable me to study illnesses seen at urgent care and learn how to quickly manage them within my scope of practice. Medicine is constantly changing and staying current is something I strive to do."*

Amanda McFee, Registered Nurse Specialist, Foothill-ASC (joined Sansum Clinic in 2017)

"I am now an experienced OR nurse who wants to expand my knowledge base. The CNOR is the only credentialing program for perioperative nurses and serves to strengthen and validate their highly specific skills. The grant from McNamara Fund will allow me prepare to become certified as a CNOR. This would enhance my confidence and augment my ability to serve as a resource to my team members. Most importantly, obtaining my CNOR would further refine my ability to provide excellent Chris McNamara and Dr. Jim McNamara patient care."

Kimberly Santos, Registered Nurse Specialist, Charge, (joined Sansum Clinic in 2012)

"The ER conference and CEN certification are valuable educational opportunities that will allow me to enhance my knowledge and performance as a registered nurse and expand my critical thinking skills. I will be able to confidently provide care that is evidence based best practice."

Michelle Viale, Medical Coder, Certified, Corporate (joined Sansum Clinic in 2016)

"I have been in the medical coding department since November 2016. In January of 2017, I started online courses with Santa Barbara City College for an AS degree in Health Information Technology. I would like to pursue additional certification from the American Academy of Professional Coders to broaden my horizons in preparation for the exam and certification."

WOMEN'S EDUCATION & BREAST HEALTH FUND RECIPIENT

Christina Jaramillo Rodriguez, Registered Nurse Specialist, Oncology Infusion Center (joined Sansum Clinic in 2016) *"This fund will allow me to take the Breast Cancer Bundle course available through the Oncology Nursing Society. The course covers prevention, breast cancer, treatments and symptom management, as well as survivorship of breast cancer. By taking this course, I will be able to provide my patients with up-to-date information regarding breast health."*



SANSUM CLINIC NURSING SCHOLARSHIP RECIPIENTS

Kristin DeHahn, Registered Nurse Specialist, Oncology Infusion Center (joined Sansum Clinic in 2015) *“My goal is to become a Family Nurse Practitioner practicing in my local community of Santa Barbara. The financial assistance will help allow me to focus on my academic success during school and will reduce my student loan debt when I begin working as an advanced practice provider.”*

Rebecca Ogletree, Licensed Vocational Nurse, Pesetas Urgent Care (joined Sansum Clinic in 2015) *“I have had the privilege of working at Sansum Clinic in Urgent Care for almost 4 years as an LVN. I have been given so many opportunities to grow, refine clinical skills, and also gain new ones. I realize how much more I could do if I were a registered nurse. I have one semester left until I graduate in December and am able to take my RN licensing exam. This scholarship will allow me to finish strong and continue my story.”*

Jasmine Pizano, Registered Nurse, Country Clinic Family Practice (joined Sansum Clinic in 2016) *“Throughout my employment with Sansum Clinic I’ve learned communication and body language is key in providing excellent patient care. Transitioning from a medical services coordinator to a registered nurse has given me phenomenal skills that have helped me address a broad range of patient concerns. This scholarship will allow me to further my education and pursue my baccalaureate degree in nursing.”*

Dr. Erno S. Daniel Legacy Award

Monica Picard, RN was awarded the **2019 Dr. Erno S. Daniel Legacy Award** by **Dr. Bryce Holderness**, Chair, Pesetas Internal Medicine Department. 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 given 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.



2017 Award recipient Ervin Loeza, 2019 recipient Monica Picard, RN with Dr. Bryce Holderness, Damaris Campero (2018) and Alex Mahto, RN the first recipient of the Dr. Erno S. Daniel Award in 2016

Medicare Advantage Stars Recognize High-Performing California Physician Organizations



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**.

Building on the **Medicare Advantage (MA)** star rating system for health plans, IHA uses a subset of 12 clinical quality measures to collect performance data and assign star ratings to 178 physician organizations based on how well they provided recommended care to more than 2 million California seniors and people with disabilities enrolled in Medicare Advantage Programs.

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.



Target BP Program TARGET:BP™

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 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 on heart disease and stroke for patients in our community.



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

Sansum Clinic Awarded APG Elite Status



Sansum Clinic was recognized for the fourth consecutive year for its achievement of **Elite status for the 2019 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.

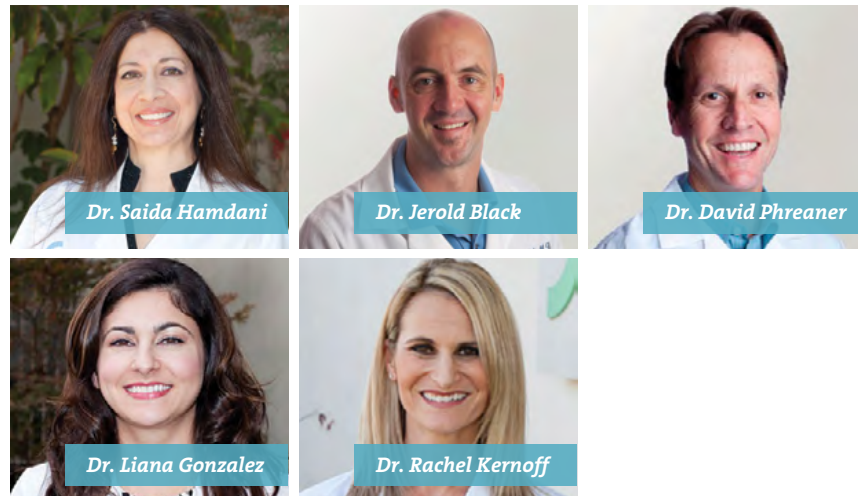
Media Awards

SEVERAL SANSUM CLINIC PHYSICIANS WERE RECOGNIZED IN THE INDEPENDENT'S BEST OF SANTA BARBARA ISSUE:



Dr. Saida Hamdani won *Best Pediatrician*; **Dr. Jerold Black** was nominated for *Best Pediatrician*.

Dr. David Phreaner, **Dr. Liana Gonzalez** and **Dr. Rachel Kernoff** were nominated for *Best General Practitioner*.



SANSUM ALSO HAD A STRONG SHOWING IN THE SANTA BARBARA NEWS-PRESS READERS' CHOICE AWARDS:



Dr. Saida Hamdani won the *Best Pediatrician* category, with **Dr. Dan Brennan** as *runner up*.

Dr. Andrew Mester was recognized as *Best Ear Nose & Throat* physician.

Dr. Glen Hollingshead and **Dr. Richard Ponce** tied as runners up for the *Best Family Doctor* category.

Dr. Douglas Katsev was runner up for *Best Lasik Surgeon*.

Sansum Clinic was recognized as *Best Medical Facility*.



SANTA YNEZ VALLEY NEWS BEST OF THE VALLEY: Recognized **Dr. Kevin Beckman** as *Best Doctor* and **Sansum Country Clinic** as *Best Family Practice*.



Sansum Clinic Leadership Council





New Sansum Clinic Physicians & Providers in 2019



Allison Akers, MD

FAMILY MEDICINE, SANSUM COUNTRY CLINIC

Dr. Akers joined the Solvang Family Medicine Department in July. She earned a Doctor of Osteopathic Medicine degree from Midwestern University, Arizona College of Osteopathic Medicine and then went on to complete a family medicine residency program at Dignity Health, Marian Regional Medical Center.



Samuel Althaus, MD

PSYCHIATRY & PSYCHOLOGY, 3916 STATE STREET, SANTA BARBARA

Dr. Althaus joined the Psychiatry Department in September. He earned his Doctor of Osteopathic Medicine degree at the Philadelphia College of Osteopathic Medicine and then went on to complete his general psychiatry residency at Loma Linda University Medical Center where he was also chief resident.



Eric Bank, MD

**MEDICAL ONCOLOGY & HEMATOLOGY
RIDLEY-TREE CANCER CENTER, SOLVANG**

Dr. Bank joined the Ridley-Tree Cancer Center in Solvang in July. He earned his medical degree from Columbia University College of Physicians and Surgeons in New York City and completed his internal medicine internship and residency at the University of California, Los Angeles. Dr. Bank then went on to do a hematology and oncology fellowship at UCLA Olive View/Cedars Sinai, in Los Angeles. Dr. Bank is a native of Santa Barbara and is glad to return to his hometown to practice.



Amanda Beaudry, OD

OPTOMETRY, PUEBLO MULTI-SPECIALTY CLINIC

Dr. Beaudry joined the Optometry team in November. She received her Doctor of Optometry Degree from Ketchum University, School of Optometry and completed her residency at the Center for Vision Development Optometry. Dr. Beaudry is a member of the American Academy of Optometry, College of Optometric Vision Development, and the California Optometric Association. She grew up in Temecula, California. She loves traveling and finds the most fulfillment treating children.



Miriam A. Commisso, LMFT

PSYCHIATRY & PSYCHOLOGY, 3916 STATE STREET, SANTA BARBARA

Ms. Commisso, licensed Marriage and Family Therapist, joined the Clinic in March. She earned her degree from Pacifica Graduate Institute in Santa Barbara and completed an internship at Santa Barbara Cottage Hospital.



Ashley Dunn, MD

EAR, NOSE & THROAT, FOOTHILL MEDICAL & SURGICAL CENTER

Dr. Dunn joined the ENT Department in August. She earned her medical degree from the Keck School of Medicine of the University of Southern California and completed her surgical otolaryngology residency training at Yale School of Medicine.



Autumn Edwards, MD

URGENT CARE, PESETAS MULTI-SPECIALTY CLINIC

Dr. Edwards, board certified family practitioner, joined Sansum Clinic in June. She earned her medical degree from the University of Cincinnati College of Medicine in Ohio and completed her family practice residency at Ventura County Medical Center. Following her residency, she has worked in urgent care facilities in Ventura.



Christina Harnsberger, MD

SURGERY DEPARTMENT, PUEBLO MULTI-SPECIALTY CLINIC

Dr. Harnsberger, board certified general and colorectal surgeon, joined the Surgery Department in July. She earned her medical degree from the University of California, Irvine. She completed her surgery internship and residency at University of California, San Diego, where she also did a research fellowship in minimally invasive surgery. She later finished a second fellowship in colon and rectal surgery at the University of Massachusetts. Dr. Harnsberger grew up in Santa Barbara and is thrilled to be back home to practice.



Charles Hunt, Au.D

AUDIOLOGY, PESETAS MULTI-SPECIALTY CLINIC

Charles Hunt, Au.D. joined Sansum Clinic in October. He earned his Bachelor of Arts degree in Speech Language and Hearing Sciences from Arizona State University, and his Doctorate in audiology from Northern Illinois University. He had been practicing as an audiologist in Orange County for several years.



Lindsay Katona, DO

HOSPITALIST PROGRAM, PUEBLO MULTI-SPECIALTY CLINIC

Dr. Katona joined Sansum Clinic in September and is practicing in the Hospitalist Program. She completed her medical training at the University of New England, did her internship at Cottage Hospital and is certified by the American Board of Internal Medicine. She also holds a Masters in Public Health from the Mailman School of Public Health at Columbia University.



Marie Claire Lamb, MD

INTERNAL MEDICINE, PESETAS MULTI-SPECIALTY CLINIC

Dr. Lamb joined the Clinic in October. She earned her medical degree at the University of Queensland Ochsner Medical School-Brisbane, Australia and New Orleans, Louisiana. She completed her internal medicine residency at the University of Florida Health Hospital & Malcolm Randall Veterans Affairs Medical Center in Gainesville, Florida where she was the chief resident of the primary care track and was a member of the Gold Humanism Honor Society. Dr. Lamb is a Santa Barbara native and is happy to return to the Central Coast with her husband, Alex Leasure, MD, who works in the Sansum Clinic Urgent Care Department.



Alex Leasure, MD

URGENT CARE, PESETAS MULTI-SPECIALTY CLINIC

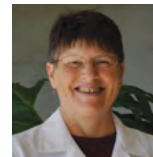
Dr. Leasure joined Sansum Clinic in July. He earned his medical degree from the University of Queensland – Ochsner Clinical School in Brisbane, Australia where he completed his medical science work and then his clinical rotations at the Ochsner School of Medicine in New Orleans, Louisiana. He finished his family practice residency at the University of Florida. He relocated to Santa Barbara with his wife, Dr. Marie Claire Lamb, who is a Santa Barbara native and works in the Pesetas Internal Medicine Department.



David Lerner, DO

CARDIOLOGY, PUEBLO MULTI-SPECIALTY CLINIC

Dr. Lerner, board certified internist and non-invasive cardiologist, joined the Cardiology Department in July. He earned a doctor of osteopathic medicine degree from Touro College of Osteopathic Medicine and then completed his internal medicine internship and residency at Lenox Hill Hospital in New York City. Dr. Lerner did his cardiology fellowship at Northside Hospital and Heart Institute in St. Petersburg Florida, followed by a second fellowship in advanced cardiac imaging at Scripps Clinic in La Jolla, California.

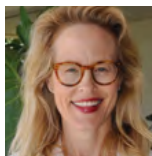


Deborah Meyers, MD

**PALLIATIVE CARE AND ADVANCE CARE PLANNING
RIDLEY-TREE CANCER CENTER**

Dr. Meyers is board certified in both internal medicine as well as hospice and palliative care medicine. She joined Sansum Clinic in October to lead the Palliative Care and Advance Care Planning Program. Dr. Meyers earned her medical degree from the University of Washington and completed her internal medicine residency at Virginia Mason Medical Center in Seattle. She worked at the Everett Clinic and Providence Regional Medical Center in an out-patient practice and as a hospitalist. As her passion for taking care of patients with serious and life-limiting diseases evolved, she helped to found the Palliative Care Program at Everett Clinic and also became medical director of a local hospice program.

New Sansum Clinic Physicians & Providers in 2019



Katrina Mitchell, MD, OBCLC, FACS

BREAST SURGERY, RIDLEY-TREE CANCER CENTER

Dr. Mitchell is a breast surgeon and lactation consultant. She joined Sansum Clinic and Ridley-Tree Cancer Center in September. She received her medical degree from Dartmouth Medical School and completed her surgical internship residency at New York Presbyterian/Weill Cornell Medical Center. Her breast surgery fellowship took her to MD Anderson Cancer Center in Houston. She helped to launch a breast cancer surgery program at an MD Anderson network hospital in Albuquerque, New Mexico where she worked until returning to her home state.



Lesa Morby, CRNA

ANESTHESIOLOGY, FOOTHILL SURGERY CENTER

Ms. Morby joined the Anesthesiology team at Foothill Surgery Center in 2019. She received her Doctorate in Nursing from Rush University and is a member of various professional organizations including the American Association of Nurse Anesthetists, Ophthalmic Anesthesia Society, Sigma Theta Tau-The National Honor Society of Nursing, and the California Association of Nurse Anesthetists.



Brian Ng, OD

OPTOMETRY, PUEBLO MULTI-SPECIALTY CLINIC

Dr. Ng joined Sansum Clinic in September. He graduated from Western University Health and Sciences College of Optometry. His internship experiences included work at hospitals in Florida and Massachusetts, as well as eye clinics in Michigan and Ohio. He's affiliated with the California Optometric Association and American Optometric Association.



Damien Ray, MD

URGENT CARE, PESETAS MULTI-SPECIALTY CLINIC

Dr. Ray joined Sansum Clinic in November. He earned his medical degree from the University of Vermont College of Medicine and completed his residency at St. Anthony North Hospital in Colorado. Dr. Ray grew up in Wyoming and Colorado and has cultivated many hobbies including hiking, skiing, sailing, mountain biking, and classic Volkswagen restoration.



Graham N. Reimer, MD

PAIN MANAGEMENT, 3916 STATE STREET, SANTA BARBARA

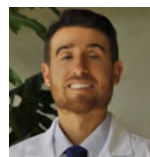
Dr. Reimer joined the Pain Management Department in April. He earned his medical degree from University of California, Davis and completed both his internship and residency at Dartmouth-Hitchcock Medical Center specializing in anesthesia and pain. He did his fellowship at Mayo Clinic in Jacksonville, Florida. Dr. Reimer is board certified by the American Board of Anesthesiology.



Cyrus W. Sircar, DPM

PODIATRY, FOOTHILL MEDICAL & SURGICAL CENTER

Dr. Sircar joined Sansum Clinic in April. He earned his Doctor of Podiatry from Western University of Health Sciences, Pomona and completed his residency at Central Alabama Veteran's Health Care System with a specialization in Podiatry.



Jason Solway, DO

DERMATOLOGY, PUEBLO MULTI-SPECIALTY CLINIC

Dr. Solway joined Sansum Clinic in September. He earned his Doctor of Osteopathic Medicine degree from Nova Southeastern University College of Osteopathic Medicine in Florida and then went on to complete his dermatology residency as Chief Resident at Largo Medical Center in Largo Florida. He is board certified by the American Academy of Dermatology.



Cathy Straits, MD

INTERNAL MEDICINE, GOLETA FAMILY MEDICINE

Dr. Straits, a board certified internal medicine physician, returned to Sansum Clinic in August, having been practicing at both Sansum Clinic and the Lompoc Valley Medical Center primary care practice. Dr. Straits earned her medical degree from East Carolina University and completed her internal medicine residency at Wake Forest University Baptist Medical Center.



Sarah Swanson, MD

INTERNAL MEDICINE, PESETAS MULTI-SPECIALTY CLINIC

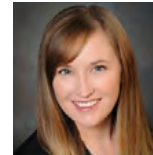
Dr. Swanson, a board certified internist, joined Sansum Clinic in July. She earned her medical degree from Brown University's Warren Alpert Medical School in Rhode Island and completed her internal medicine residency at the University of California, Los Angeles. She previously worked as a clinical instructor and hospitalist at UCLA where she served as a primary care provider and coordinator of care for a panel of patients in both inpatient and outpatient settings.



Shiela Tungol-Laffie, NP

FAMILY MEDICINE, PESETAS MULTI-SPECIALTY CLINIC

Ms. Tungol-Laffie rejoined Sansum Clinic in December, after receiving her Master of Science in Nursing degree from California State University, Fullerton. She completed her post masters Family Nurse Practitioner (FNP) program at Western University of Health Sciences in Pomona. Ms. Tungol-Laffie is affiliated with the American Association of Nurse Practitioners and Sigma Theta Tau International Nursing Honor's Society.



Meghan Wallman, MD, FACOG

OBSTETRICS AND GYNECOLOGY, 515 W. PUEBLO STREET, SANTA BARBARA

Dr. Wallman joined Sansum Clinic in September. She earned her medical degree from Creighton University School of Medicine and completed her residency at Phoenix Integrated Residency in Obstetrics and Gynecology, a collaborative program of the Maricopa Integrated Health System (Maricopa Medical Center) and St. Joseph's Hospital and Medical Center. Following her residency, she worked in an OB/GYN group practice at St. Luke's Health System in Boise, Idaho.



Honeylette Wong, NP

MEDICAL ONCOLOGY & HEMATOLOGY, RIDLEY-TREE CANCER CENTER

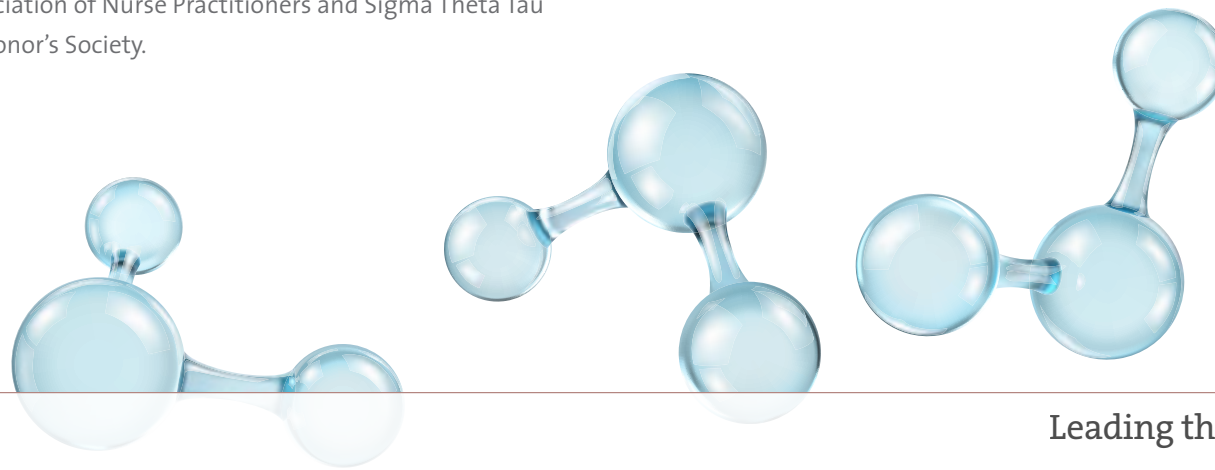
Ms. Wong joined Ridley-Tree Cancer Center in October from Ventura County Medical Center where she practiced for the last nine years. She received her Adult/ Gerontology Acute Care Nurse Practitioner degree from Grand Canyon University and her Master of Science in Nursing degree from Ventura Community College.



Cori Wright, NP

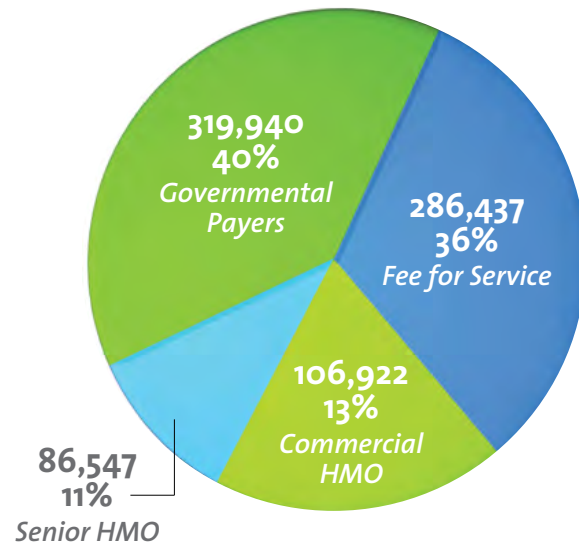
PAIN MANAGEMENT, 3916 STATE STREET, SANTA BARBARA

Ms. Wright joined Sansum Clinic in November. She received her Master of Science in Nursing degree from Penn State University and her Doctorate of Nursing from Chamberlain College in Illinois. She is certified by the American Academy of Nurse Practitioners. Prior to working at Sansum Clinic she worked in internal medicine, pain management, and addiction medicine.



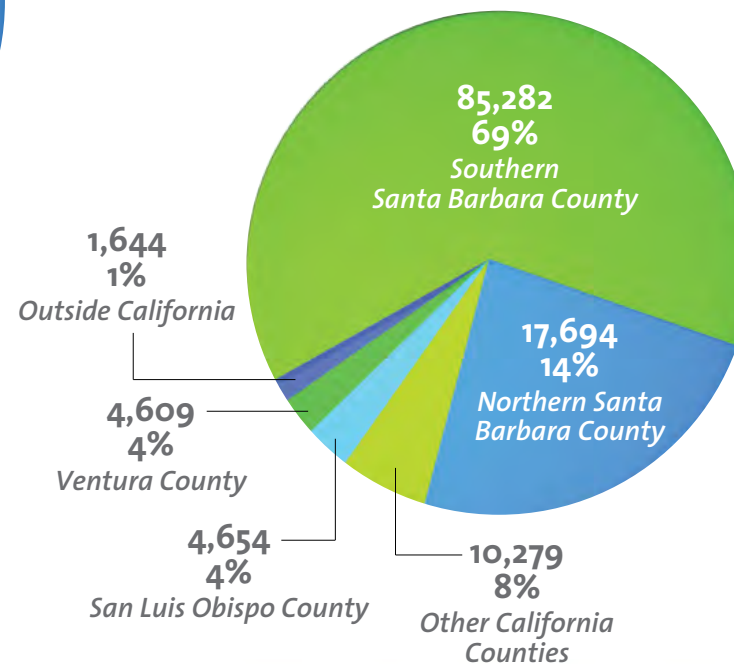
Sansum Clinic by the Numbers

Patient Visits by Insurance Category 2019



Insurer	Total Patient Visits 2019
Medicare	269,426
PPO	227,860
Commercial HMO	99,805
Senior HMO	80,536
Other Fee For Service	41,678
Medi-Cal	37,053
Medi-Cal HMO	13,441
Commercial HMO-IPA	7,117
Self-Pay	6,843
Senior HMO-IPA	6,011
Other	3,303
Workers Compensation	3,222
Indemnity	2,299
Charity Care	937
Other Government	289
Occupational Medicine	26
Grand Total	800,123

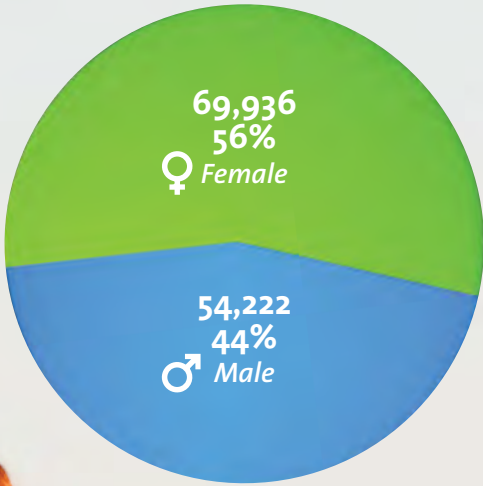
Patients by County 2019



Sansum Clinic Visits by Department

Department Name	Distinct Visits	Total Visits
Allergy & Immunology	3,940	7,860
Ambulatory Surgical Center (GI)	7,417	7,640
Anticoagulation Clinic	295	2,611
Cardiology	14,085	42,358
Dermatology	19,394	34,063
Doctors' Weight Management	386	3,597
Ear, Nose, Throat	7,326	11,820
Endocrinology	10,476	20,300
Facial Plastic Surgery	1,720	4,159
Family Medicine and Internal Medicine	88,070	126,516
Foothill Surgery Center	4,181	5,503
Gastroenterology	10,472	14,330
Genetic Counseling	843	1,070
Health Education	2,519	4,173
Infectious Disease	788	1,419
Infusion	1,944	14,743
Medical Oncology & Hematology	8,659	31,530
Nephrology	1,778	3,850
Neurology	7,200	11,932
Neurosurgery	414	447
Nuclear Medicine	4,263	8,646
Obstetrics/Gynecology	12,506	27,965
Oncology Nutrition	812	2,445
Oncology Wellness	56	119
Ophthalmology	22,029	60,449
Orthopedics	9,682	24,774
Pain Management	1,367	4,283
Palliative Care	75	132
Pediatrics & Adolescent Medicine	12,785	31,290
Physical Therapy	6,008	32,238
Podiatry	6,686	15,322
Procedure Center	1,205	3,435
Psychiatry & Psychology	2,545	10,211
Pulmonary	5,099	11,997
Radiation Oncology	1,818	29,374
Radiology	49,950	93,058
Rheumatology	5,459	13,577
Surgery	3,773	7,348
Surgical Oncology	1,396	3,052
Travel & Tropical Medicine	1,754	2,137
Urgent Care	35,479	49,299
Urology	8,485	19,051
Total Patient Visits	124,162	800,123

Distinct Patients by Gender 2019



Total Patient Visits
800,123 Visits

Distinct Patient Count
124,162 Patients

Financial Statements 2019

Balance Sheet

Assets	2019	2018	Liabilities and Net Assets	2019	2018
Current assets			Current liabilities		
Cash and short-term investments	\$30,068,538	\$28,480,097	Accounts payable and accrued expenses	\$39,448,848	\$37,383,915
Patient accounts receivable	\$28,888,752	\$22,246,216	Current portion of long-term debt	\$4,153,492	\$4,168,256
Other current assets	\$7,651,242	\$10,601,690	Total current liabilities	\$43,602,340	\$41,552,171
Total current assets	\$66,608,532	\$61,328,003	Long-term liabilities		
Property, plant and equipment, net of accumulated depreciation and amortization	\$67,098,243	\$65,583,032	Long-term debt	\$33,676,225	\$36,915,966
Other assets			Other long-term liabilities	\$13,270,236	\$11,488,496
Other assets	\$18,866,784	\$15,135,077	Total long-term liabilities	\$46,946,461	\$48,404,462
Total Assets	\$152,573,559	\$142,046,112	Net assets		
			Unrestricted	\$57,307,065	\$46,264,297
			Restricted	\$4,717,693	\$5,825,182
			Total Net Assets	\$62,024,758	\$52,089,479
				\$152,573,559	\$142,046,112



Lisa Rivas, grateful patient of Sansum Clinic, with her family

Statement of Cash Flows

2019 2018

Cash flows from operating activities

Increase in net assets	\$9,935,279	\$299,322
Depreciation and amortization	\$8,451,539	\$9,235,659
Other changes in operating assets and liabilities	\$(11,925,869)	\$(2,038,968)
Net cash provided by operating activities	\$6,460,949	\$7,496,013

Cash flows from investing activities

Net cash used in investing activities	\$(1,136,639)	\$(2,451,046)
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Cash flows from financing activities

Net cash provided/used in financing activities	\$(5,176,975)	\$(4,102,515)
Net change in cash and cash equivalents	\$147,335	\$942,452
Cash and cash equivalents, beginning of year	\$22,227,261	\$21,284,809
Cash and cash equivalents, end of year	\$22,374,596	\$22,227,261

Statement of Operations

2019 2018

Revenues

Net patient service revenue	\$260,560,532	\$241,607,995
Premium revenue	\$67,171,865	\$67,053,827
Other revenue	\$13,823,339	\$12,863,826
Total unrestricted revenues, gains and other support	\$341,555,736	\$321,525,648

Expenses

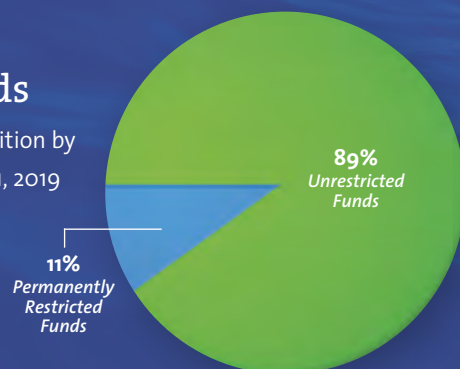
Medical service contracts	\$100,883,574	\$94,403,431
Salaries and employee benefits	\$87,409,970	\$86,077,271
Medical and professional expense	\$114,267,104	\$107,121,966
Occupancy expense	\$11,923,350	\$12,040,432
Other expenses	\$21,207,988	\$21,446,249
Total expenses	\$335,691,986	\$321,089,349

Excess of revenues over expenses to fund clinical programs

	\$5,863,750	\$436,299
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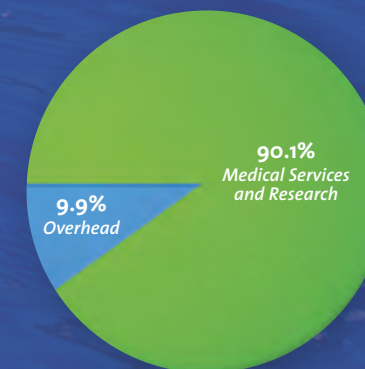
Endowment Funds

Endowment net asset composition by type of fund as of December 31, 2019 was as follows:



Functional Expenses

Sansum Clinic provides general healthcare services to residents within its geographic location. Expenses related to providing these services for 2019 are as follows:



Philanthropic Support

Lovelace Fund for Medical Excellence

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 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.



Philanthropy at a Glance

Medical excellence is never-ending. We continue to focus our efforts on keeping pace with the latest medical advancements and further enhancing our patients' healthcare experience with new programs and services.

The loyal members of our donor community help make it possible for us to provide the high quality healthcare our community deserves and has come to expect from Sansum Clinic. We are so grateful for their ongoing support which has enabled us 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 will celebrate its three year anniversary in September.**
- **Establish a 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 at our Clinic at 215 Pesetas Lane, and increase our medical staff to include 64 primary care physicians.**
- **Recruit 36 physicians, over the last decade, 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 140 specialists in more than 50 specialties and service lines.**

- 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 three 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 has brought eight national and one international expert to our community for one week each year since 2012.
- 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.
- Establish the Women's Health Initiative to bring greater focus to the special healthcare needs of women. Fifty-six percent of the Clinic's patients are women.
- Continue providing a specialized week-long camp for kids with asthma.
- 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.

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:

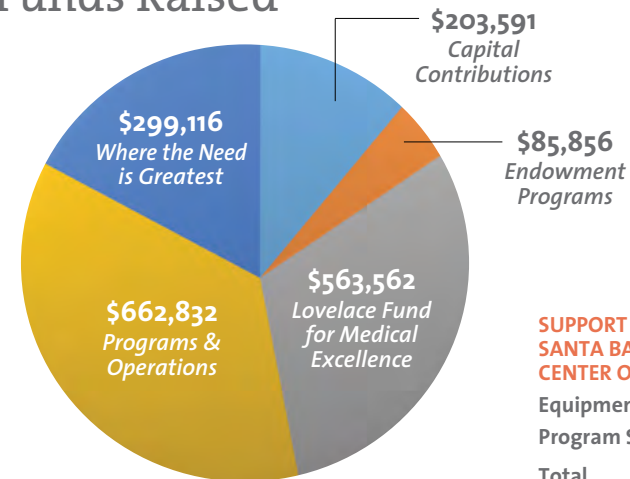
Dru A. Hartley

Director of Philanthropy,
Sansum Clinic

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

(805) 681-7726 • dhartley@sansumclinic.org • sansumclinic.org/donate-now

Funds Raised



Total = \$1,814,957

SUPPORT FROM CANCER FOUNDATION OF SANTA BARBARA FOR RIDLEY-TREE CANCER CENTER OPERATIONS

Equipment	\$ 286,906
Program Support	\$ 2,777,945
Total	\$ 3,064,851

GIFTS TO CANCER FOUNDATION OF SANTA BARBARA THROUGH SANSUM CLINIC

Total	\$ 1,585,939
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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 **33 physicians** who have benefited from having access to these loans saw **41,963 unique patients at 108,885 patient visits** last year in specialties including Cardiology, Dermatology, Gastroenterology, General Surgery, Hematology/Oncology, Hospitalists, Infectious Diseases, Internal Medicine, Neurology, Obstetrics and Gynecology, Oncology, Ophthalmology, Orthopedics, Pain Management, Palliative Care, Psychiatry, Pulmonary/Critical Care, Rheumatology and Surgical Oncology.

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.

One physician was among one of four Physicians of the Year at Cottage Health in recognition of his exemplary performance. Another physician was selected by the graduates as Teacher of the Year at the General Surgery Residency Program Graduation.

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 recently refreshed our **Neurology, Optometry and Dermatology** departments at 317 West Pueblo Street. In June 2020, our **Physical Therapy (PT)** department moved from the Foothill Medical and Surgical Center to a new modern facility designed specifically to meet the needs of our broad range of PT patients at 5385 Hollister Avenue. The move of PT has allowed us to expand our busy Urology department into the space that PT vacated, and we plan to increase our Foothill Surgery Center from 4 to 6 operating rooms in 2021 to meet our growing demand for outpatient surgery.

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





Members of the Sansum Clinic Executive Team: Matthew Kunkel, VP of Oncology Services; Chad Hine, COO; Dan Weigel, VP of Human Resources; Dr. Marjorie Newman, Medical Director; Dr. Kurt N. Ransohoff, CEO and Chief Medical Officer; Tom Colbert, VP of Information Technology; Alex Bauer, CFO; Sean Johnson, VP of Applications and Analytics



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.

Thank You to Our Donors

Sansum Clinic gratefully acknowledges the generous support of our donors \$1,000+ from January 1 to December 31, 2019. 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 **124,162 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

\$500,000 - \$999,999

Lady Leslie Ridley-Tree
The Wolf Family Foundation

\$100,000 - \$499,999

Jeffrey and Judy Henley/
J & J Foundation

Julie Nadel
Dr. Nancy O'Reilly
Natalie Orfalea Foundation and
Lou Buglioli
Bobbie and Eddie Rosenblatt
Mary Lynn and Warren Staley

\$50,000 - \$99,999

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Benjamin Wayne and
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\$25,000 - \$49,999

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Leslie and Philip Bernstein
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Sansum Santa Barbara Medical
Clinic, Inc.

\$10,000 - \$24,999

Ian and Denise Burrows
Cottage Health
Robert and Christine Emmons
Nancy Englander
Chris and Caryn Felipe
Joanne S. Freeman
Janet Friesen
Christine Garvey and George Gelles
Vicki and Bob Hazard
Hollye and Jeff Jacobs Family
Kay R. McMillan
Martin and Maureen McDermut

William and Jocelyne Meeker

John Mithun and Mercedes
Millington/John C. Mithun
Foundation

John Mithun and Mercedes
Millington/Mithun Family
Foundation

Montecito Bank & Trust

Nichols Foundation West

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Rusack Family Foundation

Betsy Sales

Maryan Schall

Donald and Mary Schmidt

Anne Smith Towbes

\$5,000 to \$9,999

Anonymous

Joseph A. Banach

Roberta and Stan Fishman

Dr. and Mrs. John Gainor

Gardner Grout Foundation

Giles Family Foundation

Howard and Nancy Gilmore

Charles and Carol Hart

Stephen and Carol Jones

Tom Kenny

Leatrice Luria

Steve and Julie McGovern

Valerie and Robert Montgomery

Samuel F. Pellicori

Henry Peterson Foundation

Santa Barbara Tennis Club

James D. Scheinfeld Family Foundation

John and Megan Shapiro

M. Robert and Lynn Sinclair

Southern California Reproductive
Center

Helga and Francis Sulger

Mr. and Mrs. Steve Zola

\$2,500 - \$4,999

Evan and Pat Aptaker

Beatrice A. Askman Charitable
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Nancy Gong	Elizabeth Vos	John and Mimi Elder	Ray and Vicky MacGregor	George Short and Christy Van Hook Short	Mark and Suzanna Larsen
Mr. and Mrs. Peter W. Gray	\$1,000 - \$2,499	Todd Engstrom, MD	John and Sally Mandel	John Sim, MD	Joanne LaTuchie
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Dru A. Hartley	Peter and Rebecca Adams	Howard Fabrick	Steve and Nicole McHugh	Mrs. Jean K. Svoboda	Heather McBride
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Sanjit and Nandita Mitra	Michael and Shannon Bernstein	John Steel and Bunny Freidus	Sara Nimmons, MD	Anthony and Jackie Yanez	Peter and Susanne Van Duinwyk
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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.

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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 **(805) 681-7726** or **dhartley@sansumclinic.org**.

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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

WELCOME warmly and sincerely

ENGAGE wholeheartedly

COMMUNICATE the plan

ASK questions to deepen understanding

REASSURE best interests are in mind

EXIT with appreciation and thanks



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