



SDCMS FOUNDATION 2009 ANNUAL REPORT

OUR MISSION:
“addressing
unmet San
Diego health
care needs for
all patients
and physicians
through
innovation,
education and
service”

CONNECTING PATIENTS WITH DONATED HEALTHCARE SERVICES

SDCMSF's Project Access San Diego (PASD) coordinates private physician volunteer care by providing patient navigation and referral management services. In 2009 PASD recruited 300 physicians in 18 specialties to see medically underserved patients for free. Eighty-six percent of PASD patients fell below 150% of the federal poverty level, earning less than \$35,000 per year for a family of four. Our PASD partners in 2009 included: Alliance Healthcare Foundation • Anesthesiology Services Medical Group • California Endowment • County of San Diego • Grossmont Healthcare District • Imaging Healthcare Specialists • Kaiser Permanente • San Diego Pathology Group • Supervisor Greg Cox • Supervisor Ron Roberts • Valley Radiology • The WebMD Foundation • UCSD Medical Center • And Many Others ...

YOUR SDCMS FOUNDATION IN THE SPOTLIGHT

SDCMSF was invited to present our innovative models of caring for the medically underserved in our community on the national stage in 2009. The County of San Diego, led by Supervisor Ron Roberts, recognized SDCMSF with a proclamation that June 16, 2009, was “San Diego County Medical Society Foundation Day,” in honor of our service to the community. Assemblywoman Lori Saldaña also recognized SDCMSF's efforts to support the needs of the safety net. In 2009, nonprofit leader Guidestar awarded SDCMSF with a preferred partner seal and a premium presence on its donor-driven website (22,000 visitors every day).

OPTIMIZING SPECIALTY CARE RESOURCES IN THE COMMUNITY

SDCMSF's new Specialty Care Access Initiative partnership with the Council of Community Clinics is increasing access to specialists at the clinic level by recruiting physicians to volunteer at health centers and by hosting specialty roundtables at SDCMS to promote referral efficiency and new referral guidelines for practicing primary care providers. E-consults are in the works for 2010.

SDCMSF FINANCIAL SNAPSHOT

FY09 ASSETS:

- » Cash: \$166,254
- » Investments: \$504,808
- » Accounts Receivable: \$53,928
- » Note Receivable: \$48,411
- » Equipment Net: \$630
- » TOTAL: \$774,031

INCOME SUMMARY:

- » Grants: \$601,712
- » Contributions: \$63,769
- » In-kind Contributions (SDCMS): \$39,135
- » Miscellaneous (bad debt recovery): \$20,934
- » Investment Income (includes losses): \$5,629
- » TOTAL: \$731,179

ACTIVITIES SUMMARY:

- » Programs: \$584,672
- » Fundraising: \$8,258
- » Administrative: \$50,216
- » TOTAL: \$643,146

YOUR SDCMS FOUNDATION IN THE HEADLINES

SDCMSF hit the headlines in 2009. We were featured in the *San Diego Business Journal*, on Fox News, on Channel 10 News, on Channel 7 & 39 News, online at Yahoo! News and at CNBC, with coverage on service to safety net patients through PASD and Surgery Days.



SDCMSF STAFF (L-R): Lauren Radano, Barbara Rodriguez, Kitty Bailey, Tana Lorah, Alisha Mann, and Brenda Salcedo

PROTECTING VOLUNTEER PHYSICIANS FROM MEDICAL LIABILITY

Medical liability protection for volunteer physicians is on the radar screen of California's legislators. SDCMSF worked to support a partnership between CMA and the Medical Board of California to introduce new legislation that will cover physicians who volunteer in California. Watch for developments in 2010.

SUPPORTING FUTURE PHYSICIANS

In 2009, SDCMSF supported future physicians through scholarships for UC San Diego School of Medicine students Ruben Carmona, Tuan Van Mia, and Colin Zimmerman. We look forward to seeing the future accomplishments of all of our scholarship winners who all demonstrated an outstanding commitment to our community.

AND HELPING PATIENTS ACHIEVE WELLNESS

Through Project Access San Diego, more than \$800,000 in donated care was provided in 2009, making a significant impact in achieving better health for patients by lowering symptomatic days, by reducing the number of missed days of work, and by reducing the number of clinic and emergency department visits.

- » 4 Surgery Days
- » \$800,000 in Donated Services
- » 600 Volunteers
- » 160 Lives Changed
- » 3 Lives Saved

SDCMSF FINANCIAL REVIEW

GOVERNANCE AND OVERSIGHT

- » The Foundation maintained focus on strong governance and oversight and implemented several new financial policies in FY09, including an investment policy and a conflict of interest policy.
- » The Foundation received an unqualified opinion from the public accounting firm Leaf & Cole, LLP, concluding another successful audit.

OPERATING BUDGET

- » Operating income increased in 2009 by 58% over the prior year, as the Foundation increased revenues and expenses to accommodate five new staff persons to support three programs.
- » SDCMSF closed the budget year with a balanced budget.

INVESTMENT REVIEW

- » Through extreme turmoil in the financial markets, the Foundation adopted an investment policy to protect the corpus of investments and maintained a disciplined approach to asset allocation and management of the investments.
- » Risk was reduced by employing a conservative reinvestment policy and shifting investments to U.S. Treasury Securities. Investments are reviewed monthly and approved by the board of directors.