



A Reason for
Optimism



2020 Annual
Report



*Arnold Schaffer, Chairman, Board of Trustees and
Kurt N. Ransohoff, CEO and Chief Medical Officer*

Dear Patients and Donors,

2020 will go down in the history of Sansum Clinic not only as our **99th year caring for patients**, but it will mark a period of great focus and commitment to delivering medical care to our patients despite the tremendous challenges of a global pandemic.

Our Clinic has endured wars, recessions, and natural disasters. Yet we had no roadmap for providing healthcare amidst a raging virus since the outbreak of the Spanish flu in the early 1900s. Like the rest of the country, we were thrust into the center of a public health crisis. Our **1,200 staff members** and **220 physicians** all feel deeply about their responsibility to care for patients, and the circumstances of the pandemic further strengthened their commitment and resolve. They helped us stay anchored to our mission, even when confronted with risks to their own personal health and that of their families.

From hospitalists and pulmonologists caring for the most fragile patients battling COVID-19, to Urgent Care nurses testing for the virus, to each staff member who donned personal protection equipment (PPE) to do their job in a safe manner, the list of our people who persevered while their own family and work lives became disrupted, is too long to print. They all have our sincerest thanks and appreciation.

An encapsulation of numbers and projects hardly scratches the surface of what has occurred within our institution during this time. However, we will not waste this opportunity to measure our progress, and move forward. At the start of the pandemic, we forged a strong partnership with the **Santa Barbara County Public Health Department**. This gave us a stake and a voice at the table in protecting patients, our employees and our community. It also guided our efforts to outfit each of our 23 sites with necessary PPE to reduce the risk of virus transmission, and influenced the wide-ranging screening and social distancing protocols we enacted that extended from exam rooms to waiting areas.

As positive cases increased, the state issued a stay-at-home order and limited the scope of medical services that could continue to serve patients. Elective surgeries got put on hold. While many patients delayed healthcare appointments, others searched for where they could be tested for coronavirus as supplies dwindled nationwide. In response, we created the county's first **drive-up appointment-based COVID-19 testing operation** to safely evaluate patients for the virus. We also offered car-based injections so patients young and old did not have to skip

critical regular vaccinations. Our pharmacies endeavored new ways to deliver medications straight to your doorstep.

Years of investment in our electronic infrastructure paid off in spades during the pandemic, when remote access to our patient community was vitally needed. Our IT brain trust built a **COVID-19 Symptom Checker app** to keep residents informed about the evolving physical signs of the virus. We launched a Telehealth program in just weeks so patients could receive care within the safety of their own homes. Hundreds of our healthcare providers quickly learned to conduct virtual visits, reducing exposure to our community while still delivering essential medical services. This digital tool transformed the way we interact with patients – and now there is no going back. **Telehealth** will remain an important and valuable tool for us to ensure quality care for our patients, when and where they need it.

As the pandemic progressed, our team's ability to flex and find new ways to safely treat patients, and access the needed supplies to do so, was extraordinary. Our frontline workers bravely persevered as the virus showed no sign of retreat. Their resilience was not enough to avoid the financial tidal wave that engulfed healthcare entities everywhere when the range of services they could provide became severely limited. The brightest financial minds at our Clinic transformed into fiscal first-responders, yet a rescue from the **CARES Act Provider Relief Fund** would come only after a several months-long furlough of more than half of our staff.

We are a nonprofit reliant on the generosity of the community we serve. We were humbled when many individuals and businesses asked how they could help. Their interest spurred the Clinic to establish the **Pandemic Relief Fund**. **Montecito Bank & Trust** generously provided the first **gift of \$50,000** and **Direct Relief** stepped up with a **\$500,000 gift**. We also received major gifts from **Dick Wolf, Jeff and Judy Henley**, The **Kemmemer Family Foundation**, **Warren and Mary Lynn Staley**, **Susie and Riley Bechtel**, **Dr. Nancy O'Reilly**, **Julie Nadel** and **Lady Leslie Ridley-Tree**. Continuous communication with our patients alongside our ongoing email updates generated many first-time gifts to our Clinic. This level of support reinforced to our team that our patients believe in the work we do, and in the valuable role we play in providing healthcare to our community, every day, and even more so during a pandemic.

This fund helped with the purchase of additional PPE and COVID-19 testing supplies, and enabled us to cover costs of the very first vaccination clinics held over the December holidays, as well as the ones that operate today. We also received many gifts in kind including N95 and KN95 masks, face shields, gowns, scrubs and gloves. **Deckers Brands** generously contributed UGG shoes and Hoka shoes for many members of our frontline staff. **Johnny Was** contributed cotton and silk masks for our entire team, and other organizations and individuals contributed homemade masks for adults and for children. (A full list of contributors can be found in the back of this report.) As a nonprofit operating in an era of diminishing insurance reimbursements, the value of this kind of philanthropic support on every level cannot be overstated. It makes a critical difference in our ability to provide exceptional care.

Clearly visible amidst the backdrop of this pandemic are the many examples over this past year of silver linings, despite moments where we've had to strain to keep them in view. We have learned a great deal from being incredibly challenged, and while we've always known it, we now even better understand what has always been our greatest asset: **our people**. Our culture is centered on a mission to keep patients our first priority. The lessons we glean while providing this care under hardship will carry us into the next decade. We **thank you** for all you have done to help us carry out our mission during this memorable season, and for how you have supported our strong, dedicated team in so many ways.

And as we have done since March 2020, we'll continue smiling under our masks.

Sincerely,



Arnold Schaffer
Chairman, Board of Trustees



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



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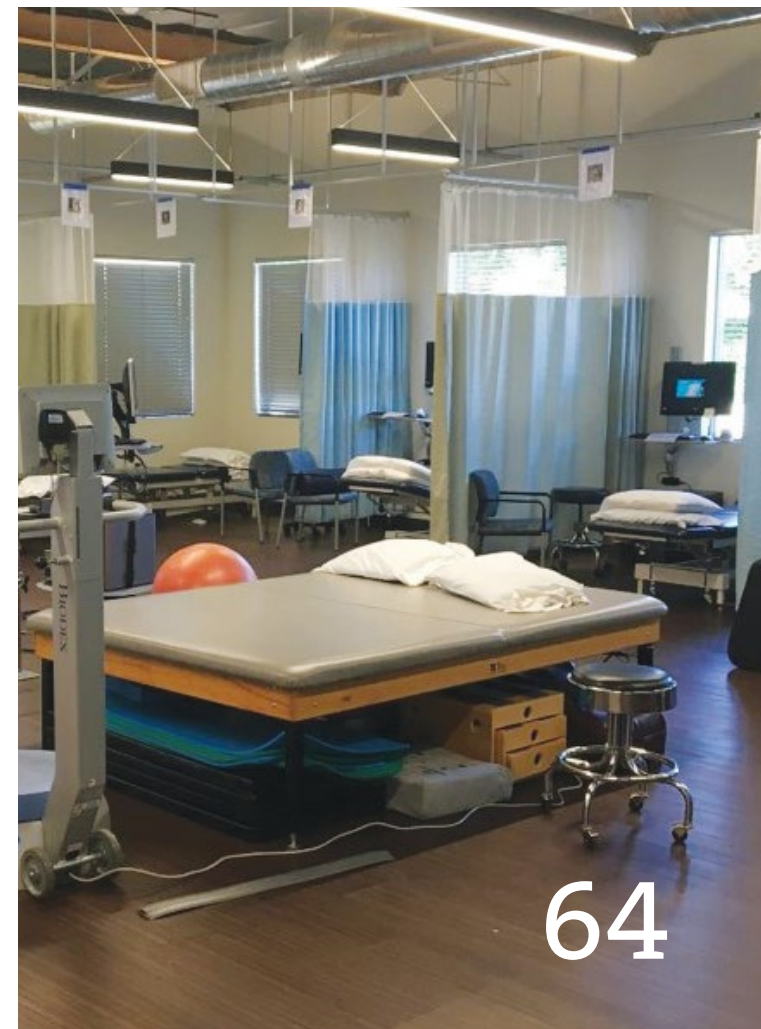


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Relief Funds During Pandemic

When a **50% drop in patient volume due to the pandemic** shutdown devastated overall revenues, even the furlough of more than half of our clinical and non-clinical staff proved to be too little to sustain our operation long-term. Alongside our state and congressional delegation, Clinic leaders argued vigorously that because of our unique nonprofit structure, and the fact that we were not linked with a larger hospital or health system that could offer financial backing, we deserved serious consideration for any potential state or federal support. While Sansum Clinic was ineligible to receive **Personal Paycheck Program (PPP)** loans because we had already enacted employee furloughs, we were successful in receiving **\$20.6 million** in 2020 (between April 2020 and January 2021) from the **CARES Act**.



CARES Act Provider Relief Fund





FOOTHILLS SURGERY CENTER
Foothills

Ridley-Tree
Cancer Center
at Salsum Clinic

JOHNNY WAS!

THANK YOU!
SUPPORT CLINIC
DURING THIS
DIFFICULT TIME

KEEP THE
FEEL THE
LIVE

WASH YOUR
HANDS

WASH YOUR
HANDS

WASH YOUR
HANDS

WEAR
MASK

Advancements in Operations

Obstetrics and Gynecology Department Safely Delivers Women's Health Services During the Pandemic

Palliative Care and Advance Care Planning Program

Victories in Pain Management

Innovative Advanced Techniques

Expert Staff Provides Exceptional Care

Excellence in Imaging

The Wave: Electronic Health Record Upgrade

Security Update



Obstetrics and Gynecology Department Safely Delivers Women's Health Services During the Pandemic

2020 was a year of triumphs and challenges for **Sansum Clinic Obstetrics and Gynecology Department**. The COVID-19 pandemic prompted restrictions throughout society, and many organizations were compelled to limit services or completely shut down. But pregnancies proceed, babies continue to arrive, and women require care for a variety of conditions related to female reproductive health. The doctors and staff at the OB/GYN department adopted rigorous measures to protect workers and patients from exposure to the virus so they could continue to safely provide women's health services during uncertain times.

Doctors from the OB/GYN department rotate shifts at **Santa Barbara Cottage Hospital** to bring approximately 100 new lives into the world per month. They provide comprehensive care for women at their offices on **West Pueblo Street** in Santa Barbara and at **Foothill Surgery Center at Sansum Clinic** on Foothill Road in Santa Barbara.

Typical services include help with issues related to fertility, contraception, disease prevention, and hormone deficiency symptoms. Providers at the department also perform routine procedures such as cancer screening, pap smears, pelvic exams, and pelvic ultrasounds. They treat uterine fibroids, which are noncancerous growths of the uterus that often appear during childbearing years. And they diagnose other benign and malignant tumors of the ovaries and uterus.

Seven physicians anchor Sansum Clinic Obstetrics and Gynecology Department (see sidebar on next page). Advanced practice providers, including three physician assistants and one nurse practitioner, perform some of the annual care exams and routine procedures. Department Manager **Rosa Booth** directs logistics related to patient appointment flow, and she helped launch Telehealth processes that enable department doctors to meet with patients without requiring in-person visits to the

clinic. These practices have been crucial during the COVID-19 pandemic.

*"The COVID-19 health crisis changed our workflow," says **Heather Terbell, MD, FACOG**. "People didn't want to come to a medical facility where they feared people may be sick with the coronavirus. Typically we see pregnant patients monthly so we can monitor the health of the baby and the mother. But we needed to pivot so we could provide the best care for people while following public health guidelines."*



Changes at the department during the COVID-19 pandemic initially included rescheduling non-essential routine procedures and annual well-visits. *"Previously we had an extremely busy practice," **Dr. Terbell** continues. "At that volume of visits there wasn't time to thoroughly implement the extra sanitation protocols that health officials recommended to mitigate the spread of the virus. We made changes so we could keep the waiting room sparsely populated. I started my day earlier so we could space out the appointments."*

David Raphael, MD, FACOG says there was a lot of uncertainty in early 2020 when the first wave of COVID-19 infections impacted the community. *"It feels like a lifetime ago," he says. "So much has changed and evolved. At first we had to shut down for anything that was not an emergency. We did a fair amount of Telehealth where we*



Dr. David Raphael, Dr. Heather Terbell and their colleagues remained focused on delivering babies – and high quality healthcare – during the pandemic

Obstetrics & Gynecology Department Providers

DOCTORS



Carin Craig, MD, FACOG



Charmian Dresel-Velasquez, MD, FACOG



David Nomeland, MD, FACOG



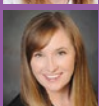
David Raphael, MD, FACOG



Navdeesh Reiners, MD, FACOG



Heather Terbell, MD, FACOG



Meghan Wallman, MD, FACOG

ADVANCED PRACTICE PROVIDERS



Joanna Gibbs, PA



Ashley McGrogan, PA



Heather Merrick, MPAS, PA



Wanda Westerman, NP, CNM

spoke with patients over Zoom video meetings. That has been helpful for maintaining a level of care and continuity with patients. But obstetrics is different from some other medical specialties. We need to be with the patient to listen to the fetal heartbeat, measure the mother's abdomen, check blood pressure, and other things that can't be done online."

"Telehealth isn't as well suited for our specialty as it is for others," Dr. Terbell concurs. "However,

"...sometimes the ability for a patient to simply check in with us on video can be very beneficial psychologically."

sometimes the ability for a patient to simply check in with us on video can be very beneficial psychologically.

It can also be helpful with follow-up appointments so we can ensure patients are feeling well after a

procedure or that a prescribed medication is well-tolerated and effective."

Staff ensured safety measures were in place to prevent the spread of the virus, enabling the department to continue to provide health services to the community. *"We were able to create a safe environment so patients felt comfortable coming to our office,"* Dr. Raphael says. *"We implemented temperature checks, patient screening protocols, plastic partition barriers, and social*



distancing guides. We all wore N95 masks and spent longer sterilizing exam rooms.”

While these measures fostered a high level of confidence about safety at the Clinic, delivering a baby presents special challenges in a pandemic. Women in labor breathe hard, and doctors are in very close proximity to them when delivering a baby. *“Patients giving birth are pushing and blowing intensely,”* Dr. Raphael says. *“In the early stages of the pandemic, nobody knew how safe that was going to be. There was no reference. We were learning on the job. We wore our N95 masks and gloves and we washed our hands, but we constantly worried about catching the virus. Some doctors slept in their garage to avoid potentially infecting family members. It was an extremely stressful time.”*

Anxiety decreased as COVID-19 testing became standard for all patients and staff who entered Cottage Hospital. Thanks to protective measures, department staff remained healthy. *“I don’t know of anybody in my office or at the hospital who contracted the coronavirus while caring for our obstetrics and gynecology patients,”*

Dr. Raphael continues. *“I believe mask wearing and testing were significant factors in prevention.”*

Dr. Terbell describes other pandemic-related challenges at the hospital that emphasize the interactive personal component of the services the doctors provide.

“When a doctor enters the waiting room after a medical procedure, friends and family of the patient always look at the expression on the doctor’s face to quickly get an indication about the outcome,” she says. *“Before the pandemic, I always made sure I entered the waiting room with a big smile on my face. But now we are wearing N95 masks all the time, so it’s harder to convey the message that everything’s fine. In the past we hugged visitors or shook their hands in congratulations on the happy occasion of a birth. Now we avoid close contact. But throughout this crisis the quality of medical care we provide remains excellent.”*

“I believe mask wearing and testing were significant factors in prevention.”



Palliative Care and Advance Care Planning Program

The **Palliative Care Program**, under the direction of **Deborah Meyers, MD**, provides supportive care for any adult patient with serious illness. This is a Sansum Clinic program that is located in the **Ridley-Tree Cancer Center**, and serves anyone in the Santa Barbara area (currently from Oxnard to Bakersfield). We address the physical, mental, social and spiritual suffering that accompanies serious illness, with a team consisting of physicians, nurse practitioners, nurses, social worker/counselors, medical assistants and care coordinators. We explore the goals of care for our patients, and complete advanced directives and **Physician Orders for Life-Sustaining Treatment (POLST)** forms. This is a multidisciplinary program that “touches” all departments within Sansum Clinic and the Ridley-Tree Cancer Center with the goal of providing enhanced care and supportive services to those who are suffering with serious life limiting illness.

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.

In the 4th quarter of 2020, the team expanded with the addition of a nurse practitioner who joined the clinical provider team. The support team consists of 3 per diem RN’s, a social worker, one medical assistant and one care coordinator. With this team in place, we have been able to care for **1,225 patients** over the past year, despite a global pandemic. We have cared for patients both in person and via a Telehealth platform, to ensure that those patients who were unable to leave their homes due to the pandemic were still able to get the palliative care services that they needed.

Advanced Care Planning teams for Sansum Clinic and Ridley-Tree Cancer Center continue to work together. We have completed advance care planning documents for more than 50% of our program patients. There is ongoing work to ensure

documents are scanned appropriately into the electronic medical record (EMR)

and communication with Cottage Health Advance Care Planning team to avoid duplication of efforts. Despite a global pandemic we were able to file **1,388 documents** in 2020 to ensure patients’ wishes are discussed and documented in a way that they are available to the entire care team.

The program’s volunteer notary continues to see 10 patients/families each month, at no charge, on site at the Ridley-Tree Cancer Center in order to assist patients and their families with completing the advance care planning documents. We are also expanding the schedule for these notary services and will be able to offer two additional hours each week.

Dr. Meyers continues her engagement and contribution in the Leadership Council of the **Alliance for Living and Dying Well**. This organization is recreating itself in 2021 and Dr. Meyers has headed the subcommittee to develop the vision statement and new role in the community. Dr. Meyers is a member of the **Oncology Leadership Council** which meets monthly at Ridley-Tree Cancer Center. She attends oncology tumor board meetings several times per week where a multidisciplinary care team, consisting of physicians in multiple specialties, discuss the care and management of patients with complex clinical care needs to ensure that care is optimized. She continues to meet and reach out to community physicians and allied care providers. She is tightly integrated with the **Santa Barbara Cottage Health** team, evaluating inpatients and directing the Palliative Care Team members, which include a nurse practitioner, RN, social workers and other staff.

Dr. Meyers meets weekly with **Michael Kearney, MD**, of **Palliative Care Consultants of Santa Barbara**, to discuss shared patients and those transferring from the hospital to other settings. She continues to mentor many of the medical residents for the Cottage Health Palliative Care rotation, and many of the residents will also shadow her in the outpatient setting.



Ridley-Tree Cancer Center has been asked to pilot the introduction of the Spanish version of the **MyCare advanced care document (Mi Vida Mi Voz)** in early 2021. As a result, we have been meeting regularly with the Cottage Health Advance Care Planning team to plan for the launch and prepare the staff/facilitators for the roll-out of this document within the **Palliative Care and Oncology Departments**. We have identified over **333 primarily Spanish speaking cancer patients** who came to the Ridley-Tree Cancer Center last year and we will systematically reach out to many of these patients to ask them to complete the Spanish MyCare document. We hope to complete at least 50 documents by mid-2021.

Dr. Meyers, Rebecca Simonitsch (Cottage Health) and **Charles Caldwell** (Hospice of Santa Barbara) are working together to develop community training programs for physicians and other health professionals (advance care directives and POLST forms).

2020 was the first full year of the program that started in October 2019. The Palliative Care Team follows more than 200 patients at any given time, with the team of nurses providing outreach and follow-up on patients and fielding urgent calls as needed. The entire palliative care team meets every Monday and Wednesday to ensure that there is a forum to discuss and collaborate on patients who may need additional care and support. In addition to using the time to collaborate and debrief on the current clinical cases, there is also some time for learning about current topics in palliative care, team building, and self-care.

The Palliative Care and Advance Care Planning Program is made possible with generous support from the **Natalie Orfalea Foundation** and **Lou Buglioli, J.S. Bower Foundation, William Williams, Lady Leslie Ridley-Tree, Benjamin Wayne and Valerie Mizuhara, Warren and Mary Lynn Staley, Hollye and Jeff Jacobs** and the **Alice Tweed Tuohy Foundation in memory of Paul W. Hartloff, Jr.**



Left to right: Mara Rodriguez, Maria Fazio, RN Specialist, Stefani Rashti, NP, Deborah Meyers, MD, Rebecca Bank, RN Specialist, Jennifer Blankenbeckler, MA and Edith Gonzalez, MSW, ASW

Victories in Pain Management

The field of pain management is evolving rapidly, with research spawning new interventional approaches for reducing or eliminating pain. **Sansum Clinic Pain Management Department** provides patients who suffer from chronic pain with established first-line treatments as well as advanced techniques that represent the leading edge of medical innovation and emerging technologies. Interventional pain management specialists **Graham Reimer, MD** and **Emanuel Zusmer, MD** lead the department.

As interventional pain management doctors, Dr. Reimer and Dr. Zusmer focus on procedures that target a specific painful area at the source of pain, therefore avoiding or minimizing the need for strong medications that can have a negative side effect profile or abuse potential. *“The three main goals are less pain, improved function so patients can return to normal activities, and less medications that may be harmful in the long term,”* Dr. Zusmer says.

2020 was a successful year for the department. Dr. Reimer and Dr. Zusmer treated age-related osteoarthritis, musculoskeletal conditions, shoulder and knee pain, bursitis, neck and back pain, radicular pain, sciatica, and other chronic conditions. *“We are a good central hub to treat people who have painful issues, even if those issues have been addressed before and have become long-term conditions,”* Dr. Reimer says.

The doctors implement multimodal or multidisciplinary pain management, which encompasses a variety of treatments. First line therapies often include non-opiate anti-inflammatories, nerve pain medications, and muscle relaxants. Steroid based procedures use real-time imaging modalities such as fluoroscopy (X-ray) to target medication to a very focused area to reduce inflammation and pain.

Sansum Clinic pain management specialists anticipate further evolution of their practices. *“We want to continue to progress in our application of innovative techniques that help patients within the community gain control of their pain,”* Dr. Zusmer says.



Innovative Advanced Techniques

For patients who do not experience satisfactory results from first-line therapies, innovative techniques that represent the latest advances in medical technology can be performed. The latest pain management methods apply modern medical technology and knowledge to provide solutions that can be very effective in helping patients return to normal activities.

NEUROMODULATION

Neuromodulation uses electrical stimulation of the spinal cord to reduce the volume of painful signals that enter the central nervous system.

VERTIFLEX

Vertiflex is a minimally invasive treatment for mild to moderate lumbar spinal stenosis. A small spacer is placed inside the spine without removal of any nearby bone or tissue.

PERIPHERAL NERVE STIMULATION

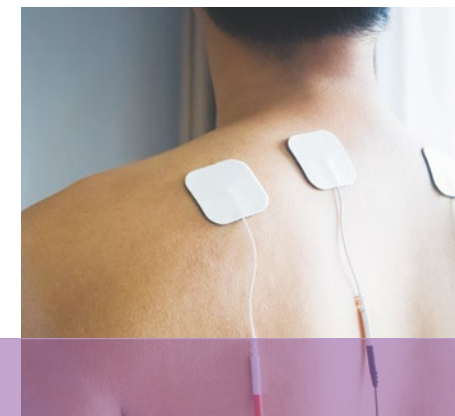
With peripheral nerve stimulation, doctors identify specific peripheral nerves that cause painful issues and apply an electrical current to that nerve to modulate it.

ULTRASOUND IMAGING

Ultrasound imaging helps doctors identify a specific muscle or nerve tissue area that is causing problems, with a high degree of accuracy. They can then target that specific site with local anesthetic and steroids.

RADIOFREQUENCY ABLATION

Radiofrequency ablation heats nerves to cause a thermal lesion that reduces pain signals. Using radio waves, doctors heat the tip of a needle and use it to ablate nerve tissue and interrupt its ability to send painful impulses.



SPHENOPALATINE GANGLION BLOCK

For patients who suffer from chronic refractory migraine headaches, doctors can apply local anesthetic to the sphenopalatine ganglion, which is a group of nerve cells that has connections to the brainstem where migraine attacks may be generated.

KYPHOPLASTY

Kyphoplasty is a surgical procedure to treat vertebral compression fractures. A specialized balloon-like device is placed into the compression fracture to restore the normal height of the vertebral body and help treat the pain from the fracture.

Expert Staff Provides Exceptional Care

Dr. Reimer earned his medical degree at University of California, Davis.

Dr. Zusmer received his medical training at University of Miami, Miller School of Medicine in Florida. Both doctors are certified with the **American Board of Anesthesiology**. Nurse Practitioner **Cori Wright** assists the doctors at the department in a team-based approach to care. She was trained and certified at Pennsylvania State University School of Nursing. Department staff also includes two medical assistants, two front-office professionals, and a billing and insurance specialist.

This program is generously funded by **Guenther** and **June Ehlers**.



Graham Reimer, MD



Emanuel Zusmer, MD



Pain Management Department



Excellence in Imaging

When advanced imaging is aligned with clinicians who understand how to harness its power, the benefits to patients are tremendous. Doctors can often not only discover a potential medical problem, they sometimes can personalize care if an illness is uncovered. **Sansum Clinic's Advanced Imaging Department** has four radiologists with the experience and training to use world-class equipment like 3D mammography or tomosynthesis, as well as automated whole breast ultrasound and MRI. Fellowship-trained breast radiologist **Winnie Leung, MD**, is the latest addition to the team. *"In modern day medicine, nary a diagnoses goes through without having an imaging study,"* remarks Dr. Leung. The conversations with patients while gathering the studies are what she enjoys the most. During the screening, she may have a woman show her an area of concern, she may perform a physical exam of the breast, ask about the size of a lump or mass, or pull up digital pictures on an exam room computer screen for the patient to see.

Dr. Leung would like cancer screenings for women to feel pleasant and stress-free. *"Breast imaging should be like going for a dental checkup. Nothing scary. I liken it to looking for a small cavity before it requires a big filling,"* she explains. Sophisticated imaging technology can locate cancer in its earliest stages, when it is very treatable. More advanced machines means fewer false-positives and less chance of having to call women back for more tests or possibly unnecessary biopsies. If cancer is detected, the imaging often guides treatment decisions and can monitor a patient's response to different therapies. Should a breast cancer diagnosis be confirmed, Dr. Leung has full confidence in referring her patients to Ridley-Tree Cancer Center. The multidisciplinary team there was one of the reasons she joined Sansum Clinic. *"Breast radiology is a highly-collaborative discipline and this approach works best for the care of the woman. You find this at big academic centers for a reason."* Dr. Leung currently chairs the Santa Barbara Breast Care Alliance, an accredited group of breast cancer experts who use a

"I want to make their care tailored and personalized And if there are questions surrounding their imaging, we can find an answer"



Dr. Winnie Leung with her family



Breast Surgeons Dr. Katrina Mitchell and Dr. Rosa Choi with Breast Radiologist Dr. Winnie Leung

team approach to care for those with breast health concerns. *“With breast cancer, we know what to do and the resources are right here in this town,”* she confirms.

Dr. Leung received her medical education at the University of Wisconsin-Madison School of Medicine where she also completed a radiology residency and breast radiology fellowship. An added benefit from Dr. Leung’s years of world-class training in Wisconsin was her marriage to her husband, **Dr. William (Hod) Dunbar**, a Sansum Clinic orthopedic surgeon. They often discuss the challenges but also very special responsibilities that come with patient care. Dr. Leung understands she often is the first to guide women through a very personal test, triage them, review their history and look for red flags. *“I want to make their care tailored and personalized. And if there are questions surrounding their imaging, we can find an answer.”*

The Wave: Electronic Health Record Upgrade

In March 2020, Sansum Clinic implemented **Wave* (Epic) Revenue Cycle**, the most significant upgrade to our electronic health record since its inception in 2011. The \$7 million expansion has proved to enhance patients’ digital experience with valuable new features that are more streamlined, efficient and easier to use.

This upgrade has not only positioned us strategically, but the timing of the launch was fortuitous as it enabled us to respond quickly to the COVID-19 crisis 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 could safely treat patients remotely, using state-of-the-art video visits. Improvements within the new system provided us with the ability to accurately capture data required by the Centers for Medicaid and Medicare Services as well as private health insurance companies so the Clinic could be reimbursed for these newly-covered healthcare services.



More than **125,000 patients** are currently signed up for **MyChart**, the secure portal that connects patients with their healthcare team and their personal medical information. A push to encourage MyChart participation allowed 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. This is a service that appears to be here to stay.

New customer service features mean less time on the phone and the ability to get more answers to questions online. The new online bill pay options are some of the most widely-used new MyChart features. Patients can now select paperless billing, pay copays and manage balances online. Patients can also communicate with members of the Patient Business Services Department using MyChart to inquire about their bills or insurance coverage. These upgrades have resulted in shorter telephone wait times, improved clinical documentation, more accurate billing and decreased claim denials.

With the new **eCheck-in tool**, patients can fill out forms or provide important information like a new insurance card or an advance directive, prior to their medical visit. Soon, patients who have a scheduled appointment but would prefer an earlier one will be able to utilize the **Fast Pass** feature within MyChart that automatically scans schedules for openings due to cancellations or rescheduled appointments, and alerts patients of earlier availability.

The rollout of new customer service features will continue throughout 2021. With direct online scheduling, patients will be able to schedule and cancel several types of appointments online using their mobile phone or their home computer

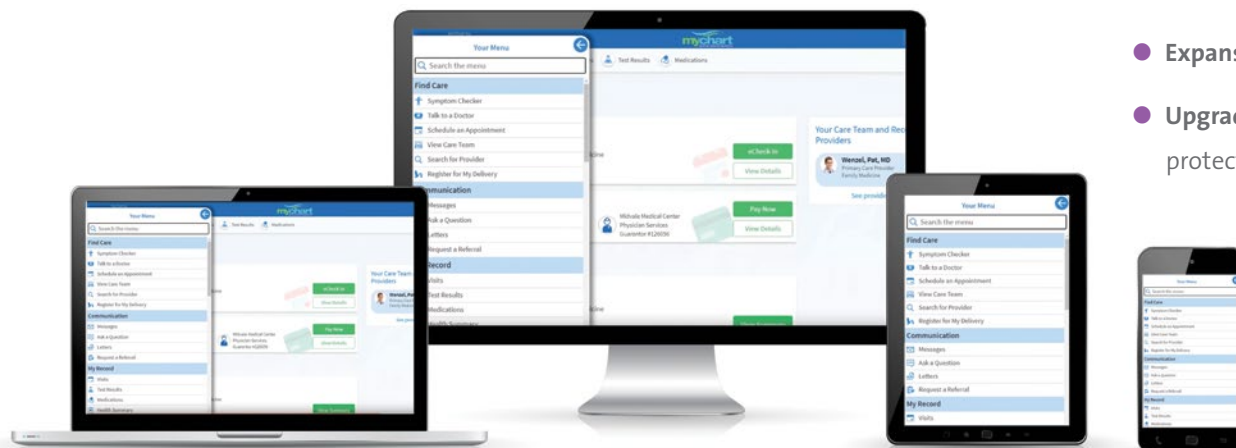
Advancements in Operations

without the assistance of a scheduler – similar to booking a flight online. Online scheduling is being introduced gradually, because of the sometimes fragile health of patients seeing specialists in departments like cardiology, nephrology or neurology, and the need for staff to evaluate symptoms that may require a prioritized appointment slot. Introducing online scheduling over time will allow the **Wave Support** department to monitor its progress, ensuring patients with complex needs are not missed, and any lab work or tests requested by physicians is flagged and can be completed before appointments.

Patient privacy is a top priority when it comes to the electronic health record. Sansum Clinic enlists the expertise of IT security consultants to ensure all of the private health information exchanged by MyChart users is completely secure. A partnership with **Union Bank** means any credit card information shared with staff or in MyChart, lives with the bank rather than residing on Clinic servers.

Investing in our technological foundation is critical to our mission to care for our community. These new electronic health record features are bolstering the foundation for a truly state-of-the-art experience for our patients.

To sign up for MyChart, visit mychart.sansumclinic.org/signup or call the MyChart help desk at **(805) 898-3333**.



Security Update

Understanding the realities that come with offering a service to the public, Sansum Clinic endeavored a complete review of all security and safety functions at the administrative and operational levels of our organization during 2020. This process, led by **John Stampe, Environmental Service Manager**, included an evaluation of the use of technology, as well a look at adherence to the industry's best practices and regulatory mandates. The Clinic partnered with **Proper Authorities**, a professional security consulting firm, to reduce vulnerabilities and risk.

- **Updating and consolidating all current security policies**, working toward one master security management plan which includes a threat management policy and an incident team
- **Physical inspections at all 23 sites**, and an action plan to remedy any potential security risks
- **Creation of the Sansum Clinic Healthcare Workplace Violence Prevention E-Learning Program** that will provide annual staff training and will be incorporated into new staff orientation
- **Hiring of Allied Universal Security day guards and night patrol services** for our Foothill, Pesetas and Pueblo locations, and a security supervisor to respond to security incidents at other branches
- **Expansion of CCTV security camera systems** to more locations
- **Upgrade of employee badge entry system** so all locations require card access to protected, staff-only areas





Telehealth had been conceived of as a great idea for years, an excellent application of internet technology, an idea whose time had come - but it took the pandemic to turn the concept into a reality because until COVID-19 struck, Telehealth was by and large not reimbursed. That changed as the need to prevent virus transmission in offices crowded with sick people took hold. This is huge and important for any number of reasons. It is good for patients, for doctors, and even for the environment – think of all those trips to the doctor which are now just trips to one’s home computer. For those of us who practice in my department – Internal Medicine on Pueblo – a substantial number of our patients are saved trips from the San Joaquin Valley, hundreds of miles away. I am very grateful that Telehealth is now a reality.

– DR. DAVID DODSON
Internal Medicine
Pueblo Multi-Specialty Clinic



Telehealth
Your Online House Call



Patient Experience

2020 Organizational Goal Performance

Your Voice Matters Employee Engagement Survey

Surgical Service Line Strives for Excellent Patient Experience

Advanced Practice Providers Offer Extra Layer of Care

Sansum Clinic Partners with WELL™ Health for Innovative Technology

Urgent Care Expands Hours of Operation

2020 Organizational Goal Performance

In order to align our improvement efforts across the organization, and to ensure we are focused on efforts that best serve our mission, Sansum Clinic sets annual goals in five key areas: **Patient Experience, Access, People, Financial Health, and Quality**. Our mission is to provide an excellent healthcare experience, recognizing our first priority is the patients we serve. This put the **Patient Experience** at the center of all we do, while prioritizing timely access to care is just as important so that we can ensure patients receive the care they need, when they need it. Our People – our dedicated, highly-trained physicians and staff – are the heartbeat of the organization, providing that care day in and day out, with skill and compassion. Steady **financial health** ensures we can continue to invest in the latest technologies and a sustainable model of providing affordable care to our community, and holding ourselves accountable to national **quality benchmarks** ensures our services are of the highest caliber.

We measure performance in each of these pillars via a number of metrics, including what we hear directly from our patients via the **Press Ganey patient experience survey**. Hearing directly from those we serve provides invaluable insight not only into our current state, but also aids us in identifying opportunities for improvement. For calendar year 2020, the organization met or surpassed the goal for all areas measured by the Press Ganey survey, including **Patient Experience** and **Access** measures. This may seem counter-intuitive in a pandemic year, but it appears our patients were extra-grateful for the high-quality care they received with us throughout the year.

Expanding our services to include **Telehealth** video visits helped to improve the Patient Experience, as indicated by performance on a number of the Press Ganey survey items. Patients appreciated being able to access care from the comfort of their own homes when coming into the Clinic for an appointment was not medically necessary.

Our 4th quarter Patient Experience results ended the year on a high note, with a **Standard Overall Mean Score of 93.3**, our highest mark since implementing



the surveys. This performance placed us in the **82nd percentile** for the state of California; the **79th for the Western Region**, and the **55th for the entire Press Ganey database nationwide**. We saw significant improvement in the Access section of the survey, likely in part at least to our Telehealth offerings as well as work underway to improve call volumes and call handling times.

Our **Financial Health** was a key area of focus throughout the year, amidst shutdowns and necessary infection control measures that meant volumes were drastically reduced, including in areas that provide margin and allow us to provide high-quality care across all departments, even those which do not contribute positively to the bottom-line. The recovery in our financial performance, which, although short of goal for the year, is relieving to see relative to the huge financial hardship we anticipated facing in the beginning months of the pandemic.

With regard to **Quality Benchmarking**, 2020 performance held steady compared to 2019, again, another extraordinary achievement given the volume of preventative care that was delayed throughout the year. We continue to remain focused on ensuring that any care that was postponed during the pandemic is provided in a timely fashion and that patients feel safe to schedule those important preventative services.

While it was a challenging year in many regards, **our people were the constant foundation** that ensured we continued to fulfill our mission, despite unprecedented circumstances for us as an organization and for many individuals on a personal level. Our providers and staff put their own health on the line to continue to care for patients, amidst ever-changing information and guidance about the coronavirus. Without our people, none of this extraordinary performance would have been possible. As we continue to recover, we remain focused on efforts to support providers and staff, through various retention and engagement efforts, while building back our teams to be more robust than ever.

Your Voice Matters Employee Engagement Survey

In 2020, Sansum Clinic conducted its second annual **Press Ganey Employee Engagement Survey**, called “**Your Voice Matters**,” in an effort to better understand the experience of employees working at our organization. This process serves as a critical source of cultural insights and delivers data-driven performance analytics to guide us through organizational improvement initiatives.

Annual employee survey data is used to develop listening sessions and action plans to improve employee engagement, reduce turnover costs, and ultimately increase patient satisfaction. Study after study shows that highly-engaged healthcare employees provide the best patient care. After receiving the 2020 results, the Human Resources team hosted over **80 Your Voice Matters Listening sessions** throughout the Clinic over the first quarter of 2021, during which we collected a variety of feedback to supplement the survey data. We have listened to employees on all topics ranging from recognition to carpet-cleaning requests.

As a result of this feedback, we have already processed and communicated a **\$1.1 million dollar compensation plan affecting 30% of our staff**. We are also developing a Clinic-wide action plan that will include items such as creating new opportunities for growth and development, improving staffing initiatives, and increasing recognition opportunities for our well-deserving staff. Each manager is expected to create and implement an action plan for their team.

We are only in our second year of this process, and already we are finding it very impactful and meaningful to our employees, or administrative team, and ultimately our patients. We will continue to experiment with new opportunities throughout the process in years to come, but feel that the broad process of surveying employees, offering a space to communicate thoughts, and following through on action items, has been a very impactful process and will only continue to improve our culture at Sansum Clinic.



Surgical Service Line Strives for Excellent Patient Experience

In addition to ensuring compliance with all of the enhanced infection control and safety protocols implemented as a result of the COVID-19 pandemic, we also enhanced our patients experience in the following ways during 2020 at the **Foothill Surgery Center** on Foothill Road and **Gastroenterology Ambulatory Surgical Center** on Pueblo Street:

PRE-OPERATIVE TELEPHONE CONSULTATIONS

All surgery patients received phone consultations with a nurse, and a text to ensure their questions were answered prior to their procedure.

COMFORTING WARMING UNITS

Warm blankets are a standard offering at our surgery centers, but new warming units gave patients extra comfort during their time with us.

NEW WORLD-CLASS TECHNOLOGY ADDITIONS

The centers added new critical care monitors to observe vital signs, new high-definition endoscopes to better pinpoint and identify tiny lesions, and 4D arthroscopy towers for enhanced identification of tears and injuries. This new technology reassures patients that their care meets the highest standards.

While the personal lives of our surgical team members were surely impacted as they continued their frontline worker responsibilities, they rose to the occasion. Volunteer clinical staff from both surgery centers were quick to assist at their locations, as



well as at other Clinic locations, to assist with COVID-19 screening protocols. These safety protocols helped to keep staff and patients safe throughout the course of the pandemic and the entire staff was grateful for the opportunity to help out where they were needed. The team worked hard to stay strong, bold and courageous, while ensuring the health, safety and comfort of our patients.

Like many departments at Sansum Clinic that weathered decreases in patient volume due to COVID-19, the major dip in case numbers in the surgical service line began in early February of 2020, and continued throughout March and April. By that time, the only surgeries being performed were urgent cases. Once the CDC and the California Public Health Department cleared the way for surgeries to resume, it was soon busy and back to normal. Even when taking into account the pandemic months, total 2020 volumes were comparable to 2019.



Advanced Practice Providers Offer Extra Layer of Care

Sansum Clinic's team of more than **40 advanced practice providers (APPs)** are a vital component to offering that extra layer of high-quality care for our patients. Throughout the pandemic, many of our APPs worked on the frontlines in the fight against COVID-19, performing more than **41,500 total patient visits with 24,561 individual patients**. The Urgent Care APPs played an essential role in the testing and triaging of patients for the virus. "Working as an APP during the pandemic was a complete shift in acute care medicine. At times it was incredibly challenging, but also very rewarding. I have never been more proud of our stellar team than this past year," commented **Jessica Ryan, PA**, Urgent Care.

Over the last several years, Sansum Clinic has intentionally increased the number

of APPs and supported educational opportunities within their specialties. In 2020, Nurse Practitioner **Stefanie Rashti** became the first APP to join the **Palliative Care and Advance Care Planning Department**, and **OB/GYN Department** Physician Assistant **Heather Merrick** began surgical training to assist with minimally-invasive robotic procedures using the **da Vinci® Surgical System**. Patients receiving care from our experienced APP team are appreciative of the additional expertise, time and attention they provide.

Physician Assistants enter competitive master's degree programs that mirror medical school training. Their rigorous education includes thousands of hours in clinical rotations. **Nurse Practitioners** are registered nurses who hold advanced degrees, either a master of science in nursing or doctor of nursing practice. Both PAs and NPs require national board certification and state licensing. New state laws passed in 2020 allowed APPs to work with less supervision, and to practice more efficiently and effectively, with the goal of improving patient access and patient care.



Advanced Practice Provider Team



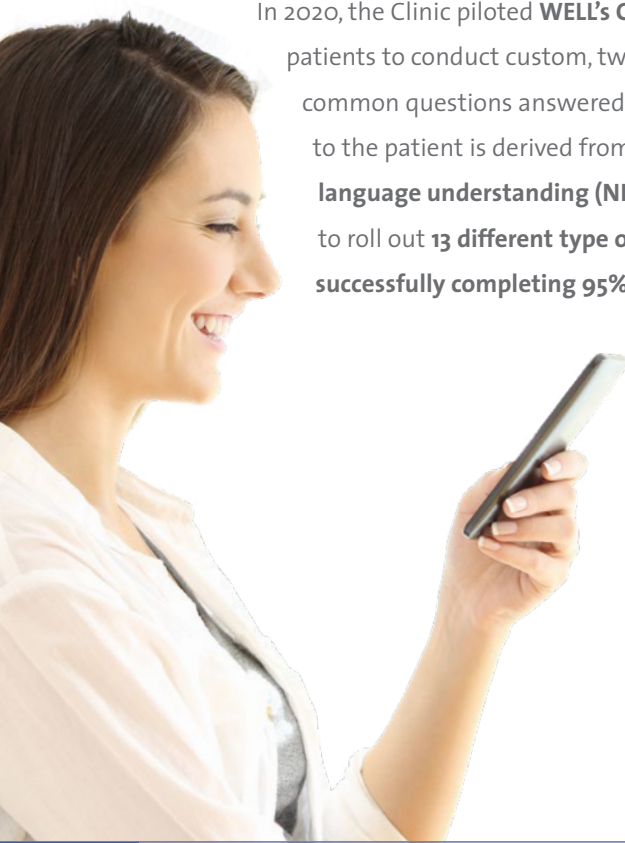
In 2020, everyone at Sansum Clinic – from Patient Service Representatives and Health Educators to Advanced Practice Providers and Medical Doctors – adapted quickly to new ways of delivering a high-quality healthcare experience to our patients.

Sansum Clinic Partners with WELL™ Health Innovative Technology

NEW PATIENT OUTREACH TECHNOLOGY ENABLES MULTI-STEP AUTOMATED PATIENT CONVERSATIONS

Sansum Clinic continually invests in technology to meet the rapidly changing needs of our patient population. In 2018, based on feedback from patients about a lack of technological advancement compared to other organizations, we identified WELL™ as a patient communication technology partner. The Clinic's adoption of this local company's digital, secure patient communication platform proved to be essential during the pandemic.

In 2020, the Clinic piloted WELL's ChatAssist chatbot feature which allows patients to conduct custom, two-way conversations and have their most common questions answered in a quick, friendly way. Information provided to the patient is derived from high-tech artificial intelligence or **natural-language understanding (NLU)**. Using ChatAssist, Sansum Clinic was able to roll out **13 different type of fully-automated patient communications, successfully completing 95% of these conversations.**



ChatAssist™ STREAMLINES TELEHEALTH APPOINTMENT WORKLOAD

Before piloting ChatAssist with certain departments for a small set of use cases, Sansum Clinic staff would call patients by telephone before scheduled Telehealth visits to troubleshoot any technical problems. While these calls helped to create a positive **Telehealth** experience, they were also repetitive and reduced staff availability for other, more complex tasks. When ChatAssist was used to streamline these technical conversations, patients with Telehealth appointments had all the necessary components set up prior to their virtual visits, and ChatAssist outreach became standard practice for these visits. The pilot also confirmed that this technology could likely improve patient communications across other departments as well.

CHATASSIST HAS BEEN “LIFE-CHANGING” FOR CALL CENTER STAFF

One of the ever-present challenges of call centers is staffing for rapidly-changing call volumes. Using a pre-built ChatAssist conversation to help patients enroll in the **MyChart patient portal** saved staff members hundreds of work hours by enabling automated patient texts containing a needed activation code. *“Supporting our call volumes has been an ongoing challenge for several years. WELL has been our Swiss army knife of a solution for some of the challenges we’ve faced,”* said **Karen Handy, MPH**, Vice President of Operations.

Sansum Clinic also employed a custom ChatAssist conversation to address

another big pain point:

insurance verification.

A pre-built ChatAssist

conversation now

automates parts of the verification process, helping staff to prioritize their work by helping determine which patients can be scheduled immediately and which need additional authorization.

Sansum Clinic is planning to take ChatAssist to the next level by creating messaging that sounds more personal, like genuine talks with friends. *“We want to make all of these communications feel conversational and not like a robot. We get really excited*

“Supporting our call volumes has been an ongoing challenge for several years. WELL has been our Swiss army knife of a solution for some of the challenges we’ve faced.”

about how we can continue to use this new technology to meet operational challenges in a way that lives up to the high-touch care we provide our patients, all in a very agile way,” commented **Lindsay Cortina**, Director of Organizational Initiatives.



Urgent Care Expands Hours of Operation

Due to an increasing community need for urgent medical services, Sansum Clinic has **expanded the hours of its Urgent Care at 215 Pesetas Lane** in Santa Barbara to **8:00 am to 7:00 pm, 7 days a week**. It is staffed by nearly 20 highly-

trained physicians and advanced practice providers, with specialized education in emergency medicine, family medicine, internal medicine and sports medicine.

The focus of this department is treating minor emergencies, acute problems and urgent medical needs of pediatric, adolescent and adult patients, like vomiting, eye, ear or bladder infections, abdominal pain, breaks or sprains, bites or burns, rashes, difficulty with breathing or vision, dehydration, colds, sore throats, fevers, cuts or injuries that may require stitches. Our physicians are also experienced and trained to treat concussions and sports-related injuries. Sansum Clinic’s comprehensive Urgent Care services include advanced imaging and intravenous therapies, and on-site lab and pharmacy services. *“Sansum Clinic’s Urgent Care, with advanced imaging and other diagnostic testing capabilities, allows us to provide the type of care and services that typically would only be found in an emergency room setting, and we have shorter wait times and lower costs to the patient,”* noted **Marjorie Newman, MD**, Sansum Clinic Medical Director.



Urgent Care Team

Culture of Collaboration

- Sansum Clinic in the Community
- Santa Barbara Neighborhood Clinics
- SEE International
- Doctors Without Walls/Santa Barbara Street Medicine
- WE CARE Year in Review
- Ridley-Tree Cancer Center Highlights



Sansum Clinic in the Community

Despite a global pandemic Sansum Clinic continues 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 have offered flu shots

through our community-wide Flu Shot Program. Due to the pandemic, we had to do things differently to ensure social distancing and to maximize the safety of our patients and staff. We offered a drive-up option and also offered patients the chance to receive a flu shot during medical appointments. The message to the community was the importance of getting a flu shot to offer protection against the flu alone, but also to lessen the chances of potentially-disastrous simultaneous COVID-19 and influenza infections. Sansum Clinic donated **2,000 flu shots to the Santa Barbara Public Health Department** which were distributed free-of-charge in their mobile outreach units. 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, especially during the pandemic. This same concept will be important with COVID-19 vaccinations.



“Thanks to social distancing, masking, and minimal travel, there was no influenza epidemic this year, which has NEVER happened in my long career. The CDC has a weekly updated ‘Fluview’ map showing the incidence of influenza throughout the country which normally has a few red spots, and gradually week by week as the season progresses the whole country goes from green meaning no flu to red meaning epidemic influenza. This year the entire country stayed green throughout the flu season, meaning tens of thousands of lives saved.”

**– Dr. David Dodson, Internal Medicine,
Pueblo Multi-Specialty Clinic**

Culture of Collaboration



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, three dental clinics, an integrated care clinic and health promotion services.

Since 2010 Sansum Clinic has provided **6,434 SBNC patients** with **7,895 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.

Since reinstating the colonoscopy screening program in 2019, **Sansum Clinic**, in partnership with the **Cancer Foundation of Santa Barbara**, **screened 69 SBNC patients**.



Sansum Clinic partners 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. Since the start of this partnership in 2019, Sansum Clinic's ophthalmology physicians and medical staff **provided eye care to 55 patients (316 services)**. Eighty percent of all visual impairment can be prevented or cured, and adequate vision care can make a remarkable impact on a person's well-being.



Doctors Without Walls



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 State 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. The pandemic changed the way they served these residents. They saw the need to increase street rounds and rounds with their mobile medical van. Rather than stand-alone clinics, they went to the clients with their backpacks containing wound care materials and medications. The need for social distancing took priority.

They saw a large increase in food insecurity among this population. A new program, **The Food Bag Collaborative**, was initiated. Large quantities of non-perishable food items were purchased, bagged and delivered to nonprofits working closely with the underserved population. DWW-SBSM would get 40+ bags of food a week to distribute to the unsheltered population. Along with hospitality items, medical care, and socks, they also became very popular with the food bags. In 2020, **DWW-SBSM served 4,305 clients** with socks, shampoo, toothbrushes and medical care. **This was an increase of 403 clients from 2019.**

DWW-SBSM is able to fulfill their mission thanks in part to the partnership with Sansum Clinic. Many Sansum Clinic physicians and staff members volunteer their time which allows DWW-SBSM to expand their reach within the community. 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.

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

- | | | |
|--------------------------------|----------------------------------|----------------------------------|
| Jesse Basra | Alex Leasure, MD | Anita Rai, MD |
| Julia Beccia | Aaron Lewis | Berenice Ruvalcaba |
| Maria Etcheverry | Lynn Matis, MFT (Retired) | Sean Scheiner |
| Mauricio Gluitz Johnson | Ashley McGrogan, PA | Brett Simon, OD |
| Marie Claire Lamb, MD | David Phreaner, MD | John Vallee, MD (Retired) |



WE CARE Year in Review 2020

WE CARE, the customer service and communications framework which guides how we interact with others to ensure the best possible care and service, became even more essential to our mission during the global pandemic. The skillful way we communicated our plan brought reassurance to our patients and our staff during a public health crisis. Our WE CARE values illuminated the importance of recognizing our own team for their stellar work under great duress. In most cases, a commitment to WE CARE goals costs little in the way of funding. But the payoff is invaluable when all Sansum Clinic employees are working together to deliberately use WE CARE actions that result in the best-possible service.

- **Inclusion of WE CARE from the very start of employment**, to communicate the plan and set the expectation that **WE CARE** is part of every interaction at the Clinic
- **WE CARE New Year appreciation letter and journal** distributed to all staff and physicians
- **WE CARE appreciation snacks** and small gifts delivered by executive team members
- **WE CARE recognition videos** from executive team members
- **WE CARE signage and posters** that reinforce WE CARE values
- **Recognition and celebration of WE CARE Champions** – both individuals and teams – including employees, physicians and providers who infuse **WE CARE values** into all they do
- **Creation of WE CARE Committee Charter**, to guide the future direction of this program
- **Creation of WE CARE Self-Care Resource E-Book** for employees
- **Creation of WE CARE Team Award**, a quarterly recognition program for teams and departments, clinical and non-clinical
- **Creation of WE CARE Wednesday**, a weekly e-zine highlighting WE CARE best practices and news from around our Clinic

- **Creation of The Upside**, a quarterly video program showcasing good news happening at all of our sites
- **Inception of WE CARE Ambassador program**, volunteer staff members from all locations who regularly exhibit WE CARE, collect and record examples of WE CARE, and provide important feedback to Clinic leadership

RADIOLOGY DEPARTMENT AWARDED INAUGURAL WE CARE TEAM AWARD

In November of 2020, **Sansum Clinic's Radiology Department** received the first WE CARE Team Award. **Karen Handy, MPH**, Vice President of Operations, presented the trophy to Director of Imaging Services **Matt McGill, RT(R) (CT) (VI)**, who received it flanked by some members of his staff. This department, which operates across 6 different Sansum Clinic locations, was chosen for its consistent improvement of patient satisfaction scores, as well as excellent teamwork and group problem solving under challenging circumstances. *"WE CARE truly thrives when it becomes more than just individual actions. To be truly effective, WE CARE must be a team sport,"* remarked Handy. She praised the team's resilience, creativity and selflessness.

Over the last year, the Radiology Department shepherded a new breast health program, and achieved accreditation from the **American College of Radiology**. Additionally, when the demand for imaging services increased, the department expanded their hours to create early, late and Saturday appointments. McGill commented that the award is especially meaningful because it represents recognition of his staff's great effort and patient-centric focus. *"Whenever there is a problem, this group comes to me with solutions. I am incredibly proud of this team,"* he said.

WE CARE is a simple acronym that guides how we interact with patients, and each other. It's a reminder that everyone at Sansum Clinic agrees to welcome others warmly and sincerely, to engage wholeheartedly with those we come in contact with, to communicate the plan effectively, to ask questions to deepen our understanding, to reassure that we have others' best interests in mind, and to exit interactions with appreciation and thanks.

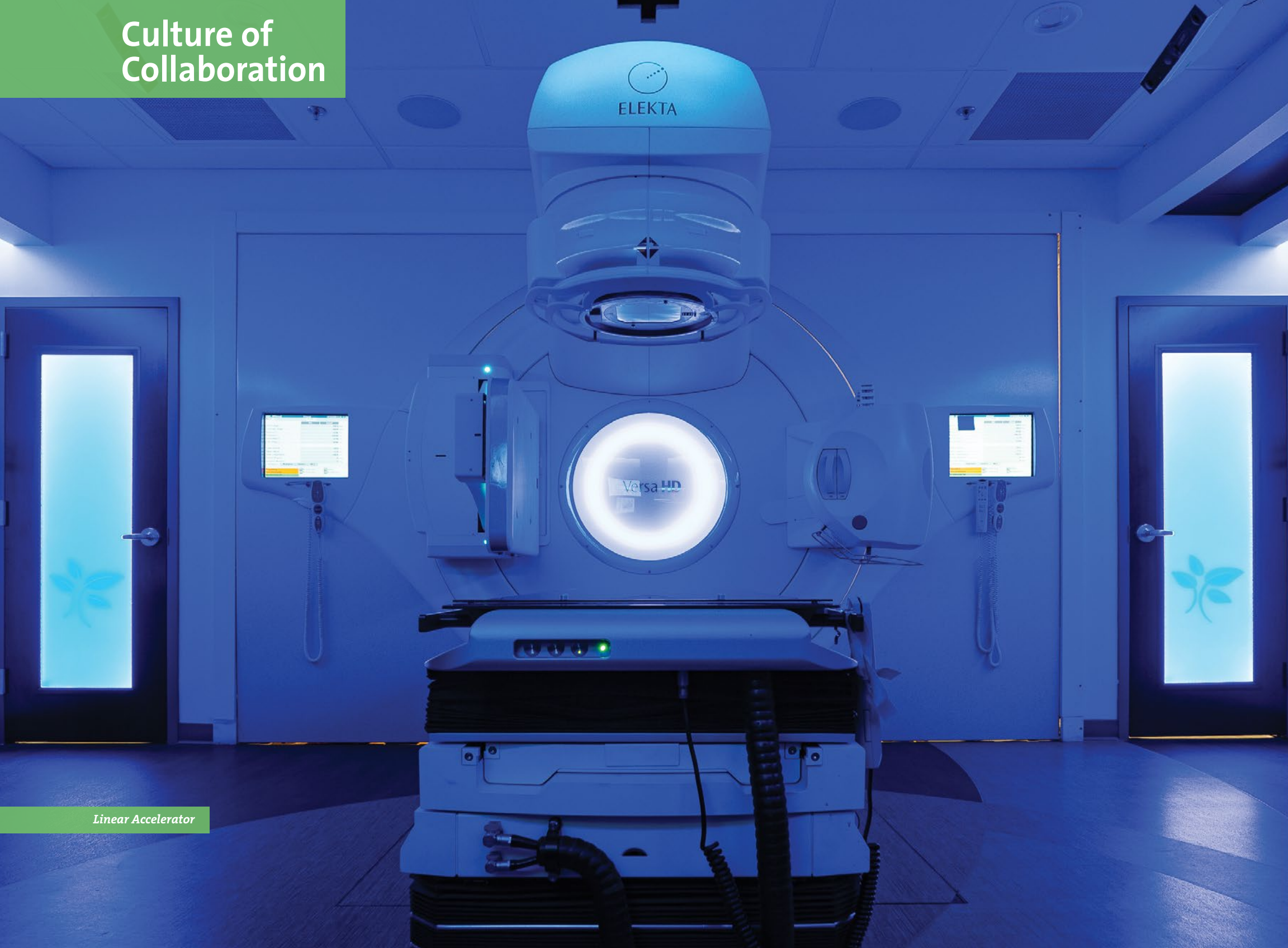




“Whenever there is a problem, this group comes to me with solutions. I am incredibly proud of this team.”

– Matt McGill, Director of Imaging Services

Matt McGill and Karen Handy with members of the Pesetas Radiology Department



Linear Accelerator



Ridley-Tree Cancer Center at Sansum Clinic

Ridley-Tree Cancer Center delivers multidisciplinary cancer care where our highly-trained physicians and compassionate staff utilize the most advanced treatment and technology, national clinical trials, research-based supportive care and wellness programs to give patients every opportunity for a successful outcome. Our locations in Santa Barbara and Solvang allow us to provide all patients in Santa Barbara County access to the myriad services we offer, close to home.

2020 Highlights



Swiftly adapted to the **COVID-19 pandemic** by implementing extraordinary screening and safety precautions, initiating Telehealth appointments and remote work, and transitioning all supportive care programs to virtual formats to protect the health and safety of patients and staff.



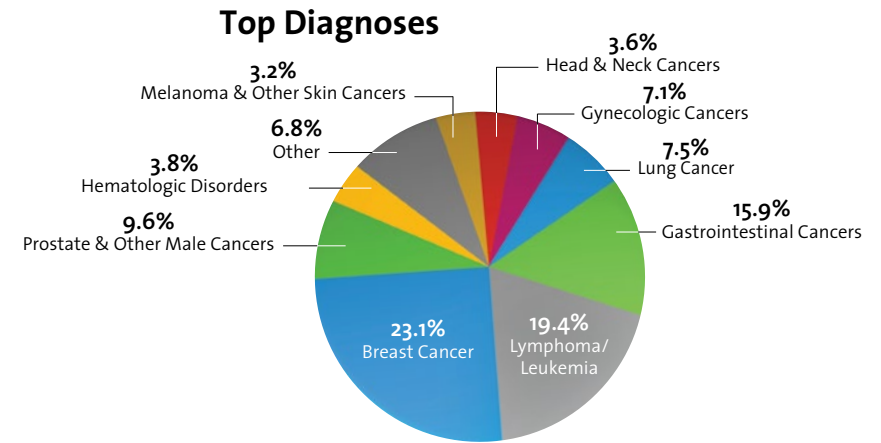
Welcomed medical oncologist **Asma Anwar, MD**, radiation oncologist **Justin Voog, MD, PhD**, and palliative care nurse practitioner, **Stefanie Rashti, CRNP**. Recruited **April Kennedy, MD** to join the Solvang oncology practice in 2021.



Formed a new affiliation with the **NRG Oncology Network**, led by **Shane Cotter, MD, PhD**, to increase clinical trial opportunities and broaden our reach into radiation oncology, surgical oncology and medical oncology research.



Appointed **Mukul Gupta, MD** as Medical Oncology Director of Clinical Research and **Ryan Kendle, MD** and **April Kennedy, MD** as co-site leads with the US Oncology Network. They join Radiation Oncology Director of Clinical Research, **Shane Cotter, MD, PhD** and Surgical Oncology Director of Clinical Research, **Charles Conway, MD, FACS**.



12,163

Unique cancer patients treated

67,402

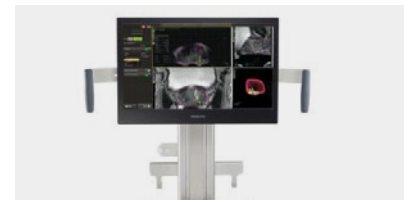
Visits to our oncology departments

65

Average age



Sansum Clinic's first fellowship-trained diagnostic breast radiologist **Winnie Leung, MD** joined our multidisciplinary Breast Cancer Program.



Acquired the **UroNav Fusion Biopsy System** with funding from the Cancer Foundation. This sophisticated technology significantly improves our prostate cancer diagnostic capabilities.



Nuclear medicine physicians **William Pace, MD** and **David Carlson, MD**, along with technologists **Tricia Peters, CNMT** and **Nicholas Heath, ARRT(R)(N)**, collaborated with Cottage Health to begin offering **TheraSphere Y-90 Glass Microspheres**, a new highly-advanced but minimally-invasive therapy to treat tumors of the liver.

Programs and services made possible through generous support from



Education & Outreach

2020 Health Education Annual Report
Health & Wellness Re-envisioned
Teen Health Roundtable
Visiting Professor of Surgery
Masked and Mighty Coalition
Community Resources Hub
A Response to Stress During COVID-19



2020 Health Education Annual Report

Health & Wellness Re-envisioned

Due to COVID-19, this was not a typical year, so this is not a typical annual summary. The year started with promise to expand and add new Health & Wellness programs and communications. By the end of the 1st quarter, all programs were suspended to support a stay-at-home plan for health and safety during a global pandemic. In 2nd quarter, we began to re-envision our programs in order to safely fulfill our purpose 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.

Staff, volunteers and providers demonstrated tremendous creativity, flexibility and dedication in creating new ways to reach patients. Some learned to do Telehealth virtual visits as effectively as an in-person office visit. Others learned to present online group programs that are engaging and valuable, no small challenge with an audience experiencing “Zoom burnout.” Still others became script writers, actors and videographers all-in-one.

The result was that programs were able to continue, new tools and approaches were developed, and new resources are now available that will remain in use even after the pandemic has subsided. Below are a few highlights.

ADVANCE CARE PLANNING (ACP)

Volunteers facilitated workshops online, social workers discussed **ACP** via **Telehealth**, and a volunteer notary continued to provide service with adjustments made for safety. As a result, **more forms were filed in 2020** than in any previous year.



ASTHMA

Although **Camp Wheez** could not be held, children and their families were given the opportunity to watch *Iggy the Inhaler*, a series of short, fun videos now on our website. To keep parents up to speed with what their children learned, **Myron Liebhaber, MD** provided an **Asthma Update** with Q&A via Zoom.

BREASTFEEDING

Breast Surgeon Katrina B. Mitchell, MD, IBCLC, PMH-C, FACS, developed a new breastfeeding course via Zoom for parents-to-be. This resource was greatly needed in the community and the class is now full every month.



Health Education Classes



ADVANCE DIRECTIVE WORKSHOP



BACK & NECK POSTURE WELLNESS



BALANCE & MOBILITY TRAINING



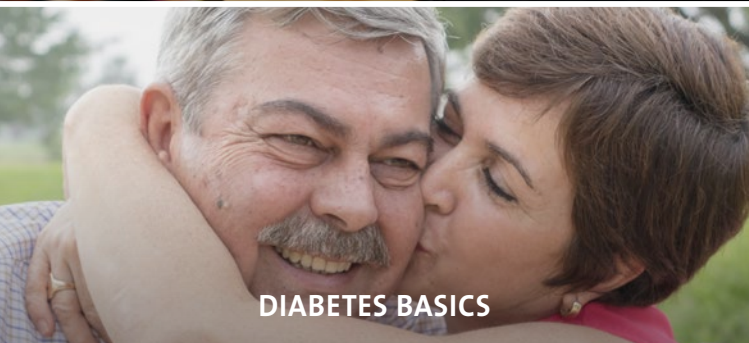
BARIATRIC SURGERY
ORIENTATION SEMINAR



BARIATRIC SURGERY SUPPORT GROUP



UNDERSTANDING DEMENTIA



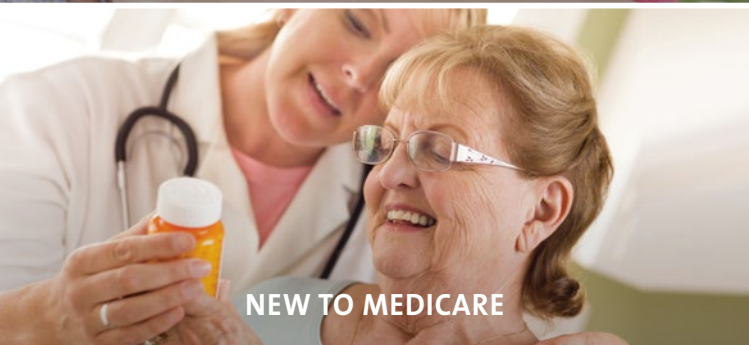
DIABETES BASICS



CAMP WHEEZ



HEALTH EATING ACTIVE LIVING – KIDS



NEW TO MEDICARE



USING MYCHART



NUTRITION NAVIGATOR



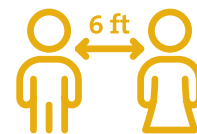
STRESS MANAGEMENT



WOMENHEART



YOGA 101



DIABETES EDUCATION

Diabetes Conversations was created as an online group education program meant to be an interactive conversation rather than a lecture. For **Diabetes Month (November)** a new Diabetes web page was created with videos and resources. A comprehensive outreach campaign resulted in more than 3 times the usual number of new users on the diabetes page. The compelling nature of the materials resulted in users spending almost 3 times the usual length of time on the page. In addition, educators continued visits both in-person and via Telehealth.

HEALTH RESOURCE CENTER

Although closed to the public, the **Health Resource Center** continues to answer questions on health and about Sansum Clinic. The updated “*Ask the Librarian*” feature on the website brings many more questions than ever before.

HEALTHY PEOPLE HEALTHY TRAILS

To address the need to encourage being active outdoors while staying safe from the pandemic, a virtual walking challenge was created. This first-time event had **more than 600 enthusiastic participants**. It will serve as a model for future programs.



MEDICAL SOCIAL WORK

While conducting **almost 100% of visits by Telehealth**, by end of year the **Medical Social Worker** was serving approximately the same number of individuals as pre-pandemic.

NUTRITION SERVICES

Nutrition Services conducted almost 100% of visits by Telehealth, and by the end of year, the dietitians were serving almost the same number of individuals as pre-pandemic.

PARTNER PROGRAMS

Partner Programs Partners offering programs remotely include **Alzheimer’s Association** groups for caregivers, **Health Insurance Counseling and Advocacy Program (HICAP)** education on **Medicare** and **WomenHeart** support for heart

disease. As a result, patients have access to a wide array of choices far beyond the ones that were held in-person in our facilities pre-pandemic. For some, especially caregivers and those who live at greater distance, there is increased attendance due to convenience.

RIDLEY-TREE CANCER CENTER WELLNESS

Out of concern for the needs of cancer patients and their families, **11 interactive programs were launched** via Zoom to provide connection and support as well as improved health. In survey results, participants agreed overwhelmingly that the programs are valuable and well-received.

WEIGHT LOSS SURGERY

Weight Loss Surgery Support groups made the switch to Zoom immediately, never missing a month and increasing attendance to the largest groups ever. Patients from a wide geographic area appreciate the convenience. In addition, **Marc Zerey, MD, CM, MSC, FRCSC, FACS** holds the orientation seminar via Zoom with good participation.



Teen Health Roundtable

On March 6, 2020, Sansum Clinic gathered expert physicians from multiple specialties for an afternoon roundtable at the Ridley-Tree Cancer Center. Led by **Kurt N. Ransohoff, MD, FACP**, CEO and Chief Medical Officer, and moderated by **Marjorie Newman, MD**, Medical Director, the panel shared their collective wisdom and experience on the greatest health risks teens face and how parents can encourage good decisions.



TOM ANDERSON, MD
URGENT CARE

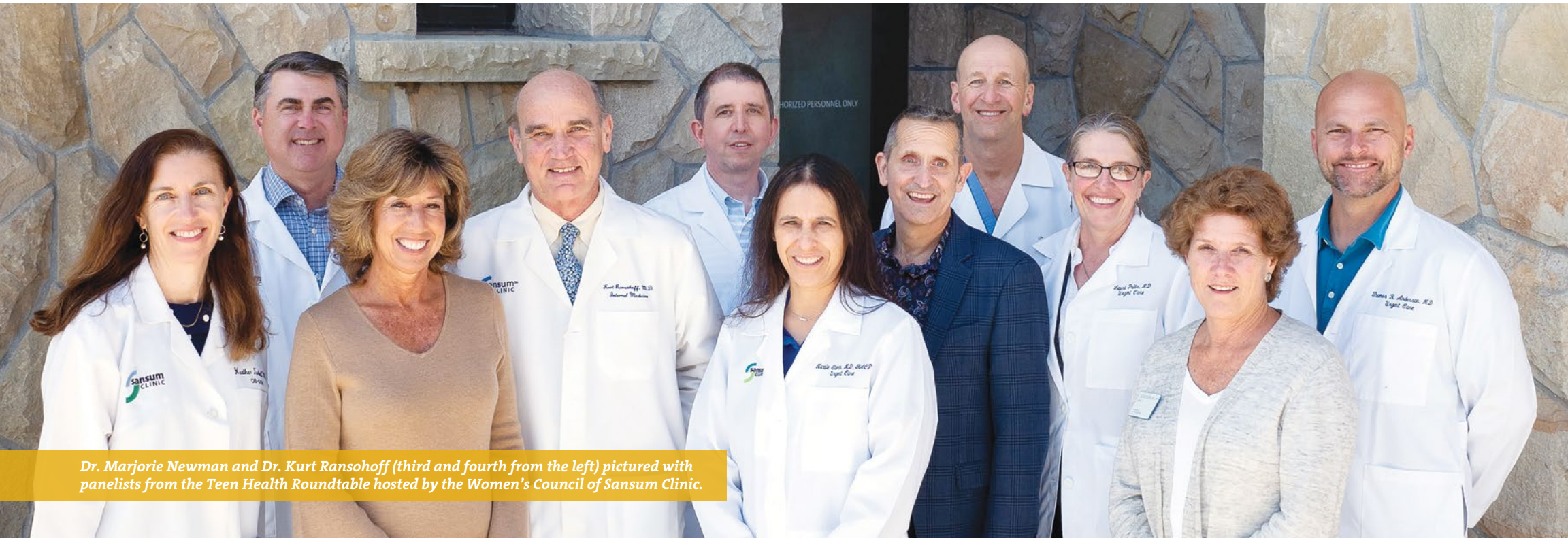
“When parents bring children in concerned about a concussion, one of the questions I often hear is, ‘When do we need to get a CAT scan?’ I always ask patients, ‘Did you lose consciousness? Did you vomit more than two or three times after the event? Was there any seizure activity? Was there

any persistent amnesia?’ That would be concerning. There is a very good assessment tool we use, the **PECARN Pediatric Head Injury Prediction Rule**, which predicts brain injury. The tool has been validated and is incredibly sensitive and specific for head injuries, and it gives patients and their families assurance.”



NICOLE STERN, MD, FACP
URGENT CARE

“While my background is in internal medicine, I also focus on sports medicine and help young athletes, teens and adolescents. In addition to concussions, some of the common things I see the most at Urgent Care in the younger patient population are ankle sprains, knee injuries, and shoulder injuries. Patellar tendonitis or jumper’s knee is growing in our young patients because they are running a lot and doing multiple sports. Some overuse injuries are preventable. Strengthening exercises can help.”



Dr. Marjorie Newman and Dr. Kurt Ransohoff (third and fourth from the left) pictured with panelists from the Teen Health Roundtable hosted by the Women’s Council of Sansum Clinic.



**DAN BRENNAN, MD, CLC, FAAP
PEDIATRICS & ADOLESCENT MEDICINE**

“When you have a teenage brain, it’s still forming. Nicotine can rewire your brain and make you want to crave it more and more.

The nicotine in vaping is supercharged so it’s really addictive. It also causes problems like anxiety, mood changes, and attention problems. Many of the vaping devices, if I had seen them just laying somewhere, I wouldn’t have known what it was because they look like a computer device or a thumb drive. Some of them are designed to fit inside of your hand so you can just puff and nobody would ever know they’re there. They don’t give off a smell and they can taste like whatever you want.”



**BRET DAVIS, MD, FACP
DERMATOLOGY**

“We expect **100,000 new cases of melanoma in 2020, and 2,500 of those cases are going to be kids** or young people 15 to 29 years

of age. What we’re trying to do is decrease the incidence of melanoma and ultimately deaths. We think sun protection and sun avoidance is part of that. Between three and five severe sunburns increases melanoma risk independently from family history or other factors. We like protective clothing, shade structures and sunscreen.”



**LAURA POLITO, MD, ASSOC. MEDICAL DIRECTOR
UCSB STUDENT HEALTH**

“This is a generation that absolutely lives their entire life on their screens. It’s very difficult to control access because everything

they do is on their device. What’s new in terms of technology is the mental health effects we’re seeing. The newer studies are showing that there is a stronger connection between depression and anxiety and the time spent on social media. One of the most important things parents can do when faced with all this screen time is to set limits. Set up phone-free zones, limit devices in bedrooms, at the dinner table and in cars. Setting the example for teenagers is very important and then just talking and listening. Keeping those lines of communication open is key.”



**SEAN JOHNSON, MHA, BSN, RN
VP APPLICATIONS & ANALYTICS**

“California has lots of protections that teenagers are provided by the State when it comes to healthcare. We have been

working to provide the medical information parents want to see, while giving teenagers the protections they want. MyChart is probably one of the greatest tools to help you have better participation and engagement in your own care. We are now providing that for teens as they learn more about their health and the concerns they have in a private and healthy way.”



Education & Outreach



DAVID RAPHAEL, MD
OBSTETRICS AND GYNECOLOGY

“Three-quarters of adolescent pregnancies are unintended. It’s a high percentage. They are clearly at risk and they’re unfortunately not as educated as they should be. Often, teens think they need to have an exam. But unless you are putting in an **IUD**, none of the other forms of contraception actually require an exam. Women and girls younger than 21 who do not need a pap smear, do not need an exam. I would encourage you to have a discussion with your teens about contraception, either with their pediatrician, or by making an appointment in our department to get them educated on their options.”



HEATHER TERBELL, MD
OBSTETRICS AND GYNECOLOGY

“**HPV** or **human papillomavirus** is the virus that can cause precancerous and cancerous lesions in the genital tract. HPV is incredibly prevalent, **70 to 80 percent of sexually-active Americans have it** or have had it. For a lot of young women, it’s their first medical scare. Because it’s a virus, there is no medicine, no antibiotic. We wait for a person’s immune system to try and fight it. In 2006, they released a vaccine called **Gardasil**. The goal is to give it to a person before they are sexually active. The best time to get it is under the age of 15 in a two-shot series. If you are over 15, you need three. The vaccine has long-lasting immunity and is incredibly effective.”



JACKIE KURTA, PSYD
UCSB ALCOHOL & DRUG PROGRAM

“We’re seeing a decrease in college alcohol use over the years, which is good news. We think more and more young people are getting information about the risks and consequences of alcohol use. What we are seeing is a great increase in vaping. It is a tremendous problem. These devices allow people to take in the equivalent of 20 cigarettes. The potency is much more intense. Students tell us that the reason they’ve not talked about

drug and alcohol abuse before is that nobody asked them. So I’m here to say please find a way to engage in the conversation without an accusatory tone, but more in a curious tone. Have them share what goes on around them. The more you can begin that conversation, the more likely it is that it will continue even after the students leave your home.”

The Teen Health Roundtable was hosted by **Julie Nadel** and **Bobbie Rosenblatt** of the **Sansum Clinic Women’s Council**, who work closely with the **Sansum Clinic Marketing and Philanthropy Departments** to educate our community about timely health issues, bolster the Clinic’s position as the leader in local healthcare, and to enhance the relationship with patients and donors.

Special thanks to sponsors **Montecito Bank & Trust** and **Rincon Events** for their support of the event.



Bobbie Rosenblatt and Julie Nadel



Ridley-Tree Cancer Center Healing Garden



Fabrizio Michelassi, MD, FACS

LEWIS ATTERBURY STIMSON PROFESSOR & CHAIRMAN
SURGEON-IN-CHIEF
WEILL CORNELL MEDICINE

Due to the global pandemic, this program is rescheduled for March 2022.

Sansum Clinic's **Visiting Professor of Surgery Education Program** provides expert educational seminars for practicing Santa Barbara surgeons and physicians. More importantly, it allows surgical residents in training at **Santa Barbara Cottage Hospital** the chance to interact with the icons, leaders and outstanding teachers of the art of surgery.



Masked and Mighty Coalition

HEALTHCARE AND EDUCATION ORGANIZATIONS
PARTNER TO LAUNCH COVID-19 CAMPAIGN

In October 2020, a strong coalition of healthcare and education partners from across Santa Barbara County joined forces to launch **MASKED AND MIGHTY**, a campaign to save lives, reduce the transmission of **COVID-19**, reopen more businesses and schools and maintain access to vital healthcare.

MASKED AND MIGHTY was based on the highly successful **Strive for 95** campaign, a grassroots effort and community-wide coalition founded by **Dr. Dan Brennan** and **Dr. Steve Barkley** in 2014, that resulted in increased local vaccination rates through a positive public awareness messaging.

Planning for the MASKED AND MIGHTY campaign began in the spring with a goal of creating positive and non-political messaging to encourage behaviors that would reduce the transmission of COVID-19 throughout the entire county.

Through a series of socially-distanced, Zoom planning sessions, the diverse MASKED AND MIGHTY Coalition, comprised of infectious disease specialists, pediatricians, healthcare leaders, teachers, superintendents, education leaders, marketing experts, public health and County officials, worked together to craft a campaign to crush the COVID-19 curve.

The original mission of the MASKED AND MIGHTY Coalition was to encourage all residents to **stay at home as much as possible, avoid large gatherings and gatherings with people who don't live in the same household, practice good hygiene, and observe social distancing of at least 6 feet.**



Geared for audiences of all ages and translated into English and Spanish, including some program elements in Mixtec, the MASKED AND MIGHTY campaign uses local imagery and people to engage all Santa Barbara County communities with messages about the importance of MASKS, and the MIGHTY powers that physical distancing, good hygiene and other preventions can have to prevent viral spread.

The Santa Barbara County Board of Supervisors issued a proclamation deeming MASKED AND MIGHTY a County-wide approach to improving health and the economy.

COMPONENTS OF THE CAMPAIGN INCLUDE:

- MASKED AND MIGHTY English and Spanish language websites: maskedandmighty.org, enmascaradoypoderoso.org.
- MASKED AND MIGHTY outreach includes County-wide TV, print, radio, digital and outdoor media.
- The MASKED AND MIGHTY Coalition kicked off the campaign during a virtual press conference, with speakers including Superintendent **Luke Ontiveros** of the Santa Maria-Bonita School District, the largest district in the County, **Dr. Peggy Dodds**, Assistant Deputy Director at the SB County Public Health Department, Sansum Clinic Pediatrician **Dr. Dan Brennan**, and **Dr. Lynn Fitzgibbons**, Infectious Disease and Internal Medicine Specialist at Cottage Health.

- **POWER UP SANTA BARBARA COUNTY.** From October 27 to November 7, super powers came together to power up landmark buildings across the County with bright multi-colored lights to demonstrate commitment to adhering to safety precautions to reduce transmission of COVID-19. The event was a fun, safe alternative to Halloween trick or-treating, with families and businesses sharing images on social media with the hashtag **#maskedandmighty**.
- A MASKED AND MIGHTY **Discussion Guide** was created for teachers to engage in conversations with students about the best ways to protect against COVID-19.



MASKED AND MIGHTY Coalition members include **CenCal Health, Central Coast Medical Association, Cottage Health, County of Santa Barbara, Lompoc Valley Medical Center, Lompoc Valley Pediatric Care Center, Marian Regional Medical Center, Sansum Clinic, Santa Barbara City College, Santa Barbara County Education Office, Santa Barbara County Promotores Network, Santa Barbara Neighborhood Clinics, School Districts throughout Santa Barbara County, UC Santa Barbara and Westmont College.**



Pesetas Multi-Specialty Clinic powers up with Masked and Mighty to educate the community about COVID-19 safety precautions



PORQUE LAS MASCARILLAS NOS HACEN MÁS FUERTES.

**ENMASCARADO
Y
PODEROSO!**



Dr. David Fisk, Infectious Disease Specialist



Masked and Mighty Coalition Co-Founder Dr. Dan Brennan and his wife, Yael

Community Resources Hub

PROVIDING RESOURCES AND RELIEF FOR PATIENTS

To help bridge the gap between healthcare and social services, Sansum Clinic launched an online resource for patients called the **Community Resources Hub**, which is accessible from any device with internet connection. This health IT solution provides easy online access to free or reduced-cost health resources and social services. The Community Resources Hub is a collaboration between **Sansum Clinic** and **Aunt Bertha**, the nation's leading social care network connecting people and programs so they can find services in their communities and get the assistance they need.



The Community Resources Hub gives our physicians and staff a place to direct patients when they identify non-medical needs like food or housing insecurity, lack of employment or transportation, and other social challenges.

Because we understand that the way our patients are born, grow, live, work and age can directly impact health, alongside socioeconomic factors like **education, neighborhood** and **physical** environment, we believe addressing these social determinants can improve the lives of those we serve and

help to reduce disparities in healthcare. Now more than ever, navigating the system to get help can be difficult, time-consuming and often frustrating. Sansum Clinic is proud to partner with Aunt Bertha which has built a vast network that simplifies the process of locating social services in our community and nationwide. Visit communityresources.sansumclinic.org.

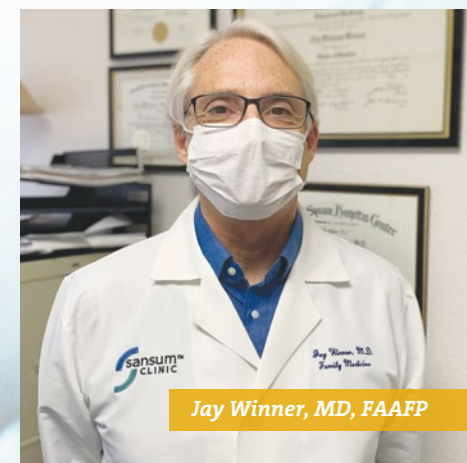
A Response to Stress During COVID-19

In direct response to this alarming picture of the psychological toll caused by COVID-19, and in an effort to assist the emotional well-being of patients, employees and community members, Sansum Clinic launched an **11-episode stress management video series** on YouTube with family medicine physician **Jay Winner, MD, FAAFP**. *“It is imperative that we address how stress from the global pandemic is impacting our emotional and physical health,”* commented Dr. Winner. *“My hope is that this series gives people real tools to help them better manage stress now, during the COVID-19 pandemic, and in the future.”*


Each episode of the series examines a different aspect of stress and how it can be reduced. Dr. Winner explains the causes of stress, and how practices such as mindfulness, meditation, reframing your perspective and the management of difficult emotions can all lower the angst and distress felt by so many. Learning a variety of skills to effectively deal with stress is important for improving one's health, relationships, and performance at work and school, according to Dr. Winner.

A physician with Sansum Clinic for nearly 30 years, Dr. Winner founded the Clinic's stress reduction program in 1992 and authored the book *“Relaxation on the Run.”* He has taught stress reduction techniques to a wide variety of groups, including health professionals, for many years. His website stressremedy.com is an important resource for patients and for anyone battling the negative health effects of stress.

To view the stress management series visit the Sansum Clinic YouTube channel at <https://bit.ly/3zvfWRb>.



Jay Winner, MD, FAAFP



“It is imperative that we address how stress from the global pandemic is impacting our emotional and physical health.”

– Dr. Jay Winner, State Street Family Medicine

Awards & Recognition

McNamara Fund for Professional Enrichment and Education Recipients

Nursing Scholarship Program

Medicare Advantage Stars Recognize High-Performing California Physician Organizations

Sansum Clinic Awarded APG Elite Status

Target:BP Program

Dr. Erno S. Daniel Legacy Award

Marjorie Newman, MD, Medical Director Recognized by *Pacific Coast Business Times* as Healthcare Champion

GI Ambulatory Surgery Center Achieves Quality Care Accreditation

Sansum Clinic Recognized As Axonics® Center Of Excellence



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. Nine recipients were awarded with grants and scholarships in 2020 toward development in their respective fields and careers. These programs continue to make a direct impact on our community, offering the assistance deserving staff need in order to afford higher education, and by developing our next generation of leaders.



Jessica Acevedo, Patient Access Manager (joined Sansum Clinic in 2013). Jessica's grant will enable her to complete her Master's in Business Administration. She worked her way up from her position as a temporary Call Center Representative to her current

role as a manager. *"Education is really important to me. I was the first individual in my family to go to college and also the first to pursue a Master's degree. Under the guidance of my supervisor Betty Lee and my experience at Sansum Clinic, I found my passion is in leadership which is why I chose a program that emphasizes nonprofit leadership. I want to find ways to develop high-performance teams that put the patient experience first and effectively learn to build strong connections with each other."*



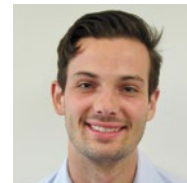
Christina Archer, MS, RD, IFNCP, Clinical Dietitian (joined Sansum Clinic in 2017). Christina's role as a dietitian is vital to helping our patients with treatment plans through Medical Nutrition Therapy and Diabetes Education. This grant will allow Christina

to complete a 10-course Dietician Training on FODMAP, which will provide her with additional knowledge to help further support patients with chronic health conditions. *"Completion of this course will reinforce the education I already have and provide the additional knowledge I need to guide patients accurately, efficiently and most importantly to ensure nutrient adequacy from beginning to end. This will allow me to further enhance care for patients at Sansum Clinic."*



Patricia Arzate, Medical Assistant, Pesetas Urgent Care (joined Sansum Clinic in 2017). Patty, an employee of Sansum Clinic for 23 years, is always looking for ways to further enhance patient care in Urgent Care. By getting her phlebotomy certification, she

will be able to perform blood draws on patients rather than sending them to a lab or waiting for an RN to become available. This will make for more efficiency within the department and ease the workload of her coworkers. *"At times, the Pesetas Urgent Care works at an ER level, high-paced and high-acuity care for 12-hour shifts 7 days a week. I love it! With a certification in phlebotomy, I will be able to do more for our patients."*



Colton Betts, Clinical Research Coordinator, Ridley-Tree Cancer Center (joined Sansum Clinic in 2017). Colton Betts wants to be

a doctor. The expenses involved with the application process can be costly. This grant for medical school applications will enable him to focus on his top prospects for medical school. *"When I am finally admitted to medical school, not only will I start the training required to make me a technically capable physician, I will also continue the mentoring process that will allow me to be the caring and empathetic physician that I aspire to be. This process was started by the physicians in both the Dermatology and Oncology Departments who have mentored me during my time at the Clinic."*



Melissa Van Groningen, RN Specialist, Pesetas Urgent Care

(joined Sansum Clinic in 2008). Melissa is a two-time recipient of a McNamara grant; this time for the American Academy of Family Physicians (AAFP) Urgent Care "livestream" update. This course will provide important updates for our Urgent Care Department, including COVID-19 information. Melissa was selected again due to the implementations and knowledge-sharing she provided after receiving her Certified Emergency Nurse certification in 2016. *"These topics will directly translate to my work in the Urgent Care in helping to identify septic patients as well as servicing a large elderly population and more efficient triage of patients."*

Nursing Scholarship Program



Kim Hurley, RN, Director of Operations (joined Sansum Clinic in 1986). Kim Hurley is a 34-year veteran of Sansum Clinic having worked in multiple areas and departments. Most recently, Kim spearheaded the COVID-19 efforts at the Clinic. Kim is a strong leader and highly-regarded member of the staff. She was awarded a scholarship toward obtaining her BSN. *“My goal is to be a resilient leader and to use education to get me to my next position at Sansum Clinic. While my career path may not have been a straight line to each goal, the twists have lead me back to my original goal of being the best caretaker and leader I can be.”*



Alexis Tinajera, LVN, Hitchcock Pediatrics (joined Sansum Clinic in 2019). Alexis brings great passion to her role as an LVN to our littlest patients. Her goal is to complete the LVN to RN bridge program. *“Being able to see a variety of patients from a first neonate visit to a patient’s last 18-year check really brings excitement to the work day. In the Pediatrics Department you are not only connected to the patient, you are connected to the entire family which makes the job even more fulfilling.”*



Sarah Delgado, Clinical Resource RN, Hitchcock Pediatrics (joined Sansum Clinic in 2012). Sarah’s heartfelt essay really struck a chord with the review committee and she was awarded a scholarship towards her BSN. As a Clinical Resource RN in the Pediatrics Department, Sarah is a go-to for clinical questions and leadership on the floor. *“I love the nursing field. As a nurse, I took an oath to devote myself to the welfare of the patients I serve...it’s my moral obligation.”*



Lori Wells, RN Specialist, Pesetas Urgent Care (joined Sansum Clinic in 2008). In her 12 years at Sansum Clinic, Lori has made such a wonderful impression on patients and staff. She started as an LVN and moved up to her current position as an RN in the Urgent Care Department. This scholarship will enable her to become a Nurse Practitioner. *“I will continue to work for Sansum Clinic as I advance my career with this incredible learning opportunity. I really have learned a lot along the way and I value the work I do.”*

Special thanks to **Dr. James** and **Chris McNamara** for establishing the **McNamara Fund for Professional Enrichment and Education**, and to the many donors who have chosen to support the McNamara Fund.

Nursing Scholarships are made possible through the generous support of **John C. Mithun Foundation** and **Mithun Family Foundation**.

Congratulations to all our award recipients. We’re so proud of you and greatly appreciate the investment you are making towards your career and the health and well-being of our patients and the community we serve.



Dr. James and Chris McNamara

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 13 clinical quality measures to collect performance data and assign star ratings to 186 physician organizations based on how well they provided recommended care to more than 2 million California seniors and people with disabilities enrolled in MA health maintenance organizations (HMOs).

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

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



Sansum Clinic Awarded APG Elite Status

Sansum Clinic was recognized for the fourth consecutive year for its achievement of Elite status for the **2020 APG Standards of Excellence™** survey. **America's Physician Groups (APG)** is the largest association in the country representing physician organizations practicing capitated, coordinated care. Each year, APG assesses tools and processes its members have in place to meet escalating expectations of healthcare purchasers and patients.

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

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

Target:BP Program TARGET:BP™

Sansum Clinic was recognized by the **American Heart Association (AHA)** and **American Medical Association (AMA)**'s **Target: BP 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 blood pressure in our patients, while the **Sonar Clinical Quality Team** ensures we can trend and monitor data, provide it to clinical teams for ongoing management, and report performance to health plans. Sansum Clinic is proud to be recognized as a leader in helping reduce the devastating impact of high blood pressure in terms of heart disease and stroke for patients in our community.

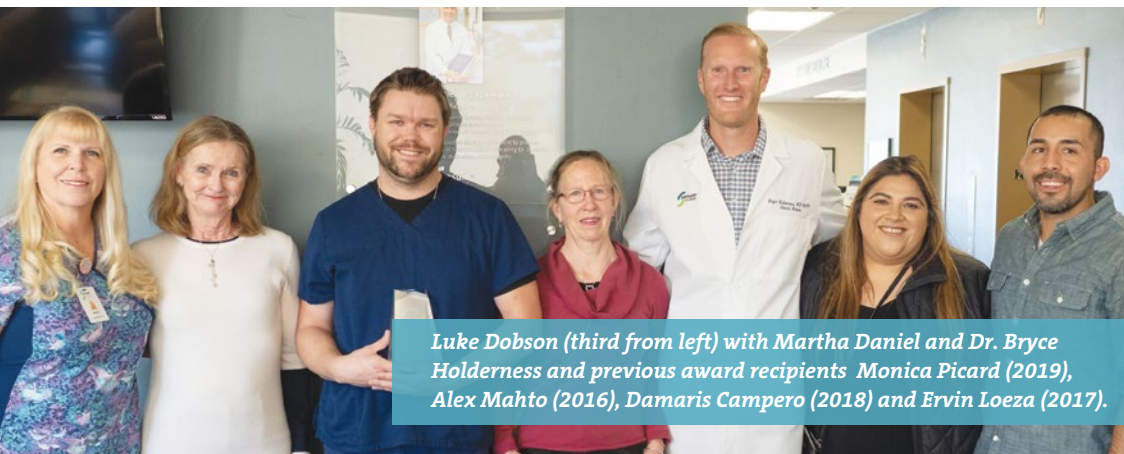
Dr. Erno S. Daniel Legacy Award

AWARDED TO SANSUM CLINIC MEDICAL ASSISTANT LUKE DOBSON

Luke Dobson was awarded the **Dr. Erno S. Daniel Legacy Award** for 2020 by **Dr. Bryce Holderness**, Pesetas Internal Medicine Department Chair, at a department luncheon in February. Luke joined Sansum Clinic in January 2017 as a Medical Assistant.

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 by **Dr. Holderness** and **Martha Daniel** to an employee in the **Pesetas Internal Medicine Department** who exemplifies compassion, dedication, and integrity.



Luke Dobson (third from left) with Martha Daniel and Dr. Bryce Holderness and previous award recipients Monica Picard (2019), Alex Mahto (2016), Damaris Campero (2018) and Ervin Loeza (2017).

Marjorie Newman, MD Healthcare Champion

Sansum Clinic Medical Director **Marjorie Newman, MD** was selected by the **Pacific Coast Business Times** as a **Champion in Healthcare**. The Champions in Healthcare issue pays special tribute to professionals who have notably exercised their knowledge and skills during a time of global crisis. As COVID-19 made its way around the globe in early 2020, Marjorie Newman, MD, provided expert leadership in preparing Sansum Clinic for the myriad impacts on delivering high-quality healthcare during a pandemic. Dr. Newman leads the **Clinic's Infection Control Program** and oversees how it is carried out throughout our **23 patient facilities**, which meant that in 2020, she led the development of triage protocols to determine which patients are eligible for COVID-19 testing, based on the global supply chain shortage of required materials; she developed the procedures for **Sansum Clinic's car-based COVID-19 testing program**, one of the largest in Santa Barbara County; she initiated the **COVID Exposure Prevention Plan** to ensure our staff and providers remain healthy and able to care for the needs of our patients; and she worked closely with the **Santa Barbara County Public Health Department** to develop procedures and protocols for caring for the broader base of patients in our community.

Dr. Newman provided weekly COVID-19 trend updates to all our staff and physicians, which also served as the basis for the educational communication to our community of **more than 100,000 patients**. In addition to working with the Executive and Finance teams to secure federal funding so Sansum Clinic could continue seeing patients during this time, she provided regular updates to the Sansum Clinic Board of Trustees so they were armed with information needed to make critical business decisions to ensure the Clinic's solvency throughout the pandemic.

**CHAMPIONS
IN HEALTH CARE**



Dr. Marjorie Newman

GI Ambulatory Surgery Center Achieves Quality Care Accreditation

Sansum Clinic's **GI Ambulatory Surgery Center** has received accreditation from the **Accreditation Association for Ambulatory Health Care, Inc. (AAAHC)**, a leader in the field accrediting **more than 6,100 organizations**. The achievement is the highest third-party recognition that a surgery center can achieve and is considered to be the gold standard for the industry. It distinguishes our **Gastroenterology Department** from many other outpatient facilities through its adherence to rigorous standards of care and safety. Status as an accredited organization means **Sansum Clinic has met nationally-recognized standards, participates in peer-review and education to consistently provide better care and services**, and is **committed to a thorough, on-site survey every three years** by AAAHC staff who themselves are healthcare professionals.

This milestone also means the Center has met all conditions in order for Medicare patients to receive coverage. *"Continuous improvement is part of the mindset that allowed us to accomplish this accreditation and it is something that we strive to integrate into our daily activities long after the on-site survey is completed,"* commented **Marjorie Newman, MD**, Sansum Clinic Medical Director. *"Our intent within the Center and across the Clinic is to adopt policies and procedures that fuel advancement and long-lasting quality care."*

The AAAHC helps the Center find new ways to improve care as well as increase efficiency and reduce costs. For nearly 40 years, accreditation has been the highest form of public recognition that a healthcare organization could receive for the care it offers. The Center is staffed by board-certified gastroenterologists, alongside an experienced team that uses the latest techniques and technologies for diagnosis and treatment, including advanced procedures like endoscopy and colonoscopy.



Sansum Clinic Recognized as Axonics® Center of Excellence

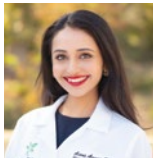
In August, Sansum Clinic received designation as an **Axonics Center of Excellence** by **Axonics Modulation Technologies, Inc.** The designation recognizes Sansum Clinic's **Urology Department**, specifically **Dr. Alexandra Rogers**, for her expertise with **Axonics Therapy** and her sincere commitment to changing the lives of patients suffering from bladder and bowel dysfunction. This evolved therapy option utilizes implantable devices to stimulate the sacral nerve and restore normal communication between the brain and the bladder. Dr. Rogers is the only fellowship-trained female urologist with this specialty in the Santa Barbara area and is the number one physician user of Axonics Therapy in California. *"This therapy approved in just the last year is changing the landscape of how we treat and manage both urinary and fecal incontinence,"* reports Dr. Rogers. *"The efficacy can have a significant impact on quality of life."*

Millions of Americans suffer from overactive bladder and fecal incontinence. Axonics Therapy has been clinically proven to provide rapid and long-lasting relief of symptoms associated with bladder and bowel dysfunction. The **Axonics Center of Excellence Program** recognizes highly-trained and experienced physicians (typically urologists and urogynecologists) and clinical practices that are committed to patient education and providing exemplary care.



Dr. Alexandra Rogers, third from left, pictured with members of her team

New Sansum Clinic Physicians & Providers



Asma Anwar, MD

MEDICAL ONCOLOGY AND HEMATOLOGY

Dr. Anwar, board-certified medical oncologist and hematologist, joined the Medical Oncology Department at Ridley-Tree Cancer Center at Sansum Clinic. Dr. Anwar earned her medical degree at Fatima Jinnah Medical College for Women in Pakistan. After an internal medicine internship at the University of Connecticut and an internal medicine residency at the University of Washington, Dr. Anwar completed a hematology and oncology fellowship at the University of Washington/Fred Hutchinson Cancer Research Center. Prior to joining Ridley-Tree Cancer Center, she worked as a medical oncologist at Ironwood Cancer & Research Centers in Arizona.



Amanda Beaudry, OD

OPTOMETRY

Dr. Beaudry joined the Optometry Department at the Pueblo Multi-Specialty Clinic. She received her Doctor of Optometry degree from Ketchum University, School of Optometry and finished her residency at the Center for Vision Development Optometry in Pasadena, CA. Dr. Beaudry is a member of the American Academy of Optometry, College of Optometric Vision Development and the California Optometric Association and finds the most fulfillment treating children.



Mia Benton, PA

CARDIOLOGY

Ms. Benton joined the Cardiology Department at the Pueblo Multi-Specialty Clinic. She completed the Duke University Physician Assistant Program and completed an emergency medicine fellowship at Duke University Medical Center in Durham, NC. She is certified by the National Commission of Physician Assistants.



Joy Buechler, NP

ORTHOPEDICS

Ms. Buechler joined the Orthopedics Department at Foothill Medical and Surgical Center. She earned her Master of Science in Nursing at Yale School of Nursing in Connecticut and is a board-certified family nurse practitioner (FNP-C) from the American Academy of Nurse Practitioners. She has worked at Stanford Health Care in Palo Alto, CA and most recently worked at the Hospital for Special Surgery in New York City as a nurse practitioner in adult reconstruction and joint replacement. Buechler has specialized in both the in-patient and out-patient settings evaluating and treating patients with hip and knee osteoarthritis (OA), as well as assisting in the operating room.



Victoria Eng, MD

ALLERGY & IMMUNOLOGY

Dr. Eng joined the Allergy & Immunology Department at 51 Hitchcock Way. She earned her medical degree from Georgetown School of Medicine in Washington, DC and completed a pediatric residency at Kaiser Permanente in Los Angeles, CA where she then went on to complete her allergy and immunology fellowship.



Joanna Gibbs, PA

OBSTETRICS & GYNECOLOGY

Ms. Gibbs joined the Obstetrics & Gynecology Department at 317 West Pueblo. After completing her undergraduate degree at University of California, Santa Barbara (UCSB), Gibbs attended Samuel Merritt University in Oakland, CA where she earned her physician assistant certification. Prior to joining Sansum Clinic she worked at Planned Parenthood in Los Angeles and at the Santa Barbara Fertility Center.



Ron Golan, MD

UROLOGY

Dr. Golan joined the Urology Department at the Foothill Medical and Surgical Center. Dr. Golan earned his medical degree from the University of Pennsylvania School of Medicine and then went on to complete his urology residency at Weill Cornell Medical Center where he was chief resident. In addition to a rotation at Memorial Sloan Kettering Cancer Center where he was an acting uro-oncology fellow, he completed an endourology fellowship at Columbia University Medical Center in New York City.



Caitlin Harris-Hwang, DO

URGENT CARE

Dr. Harris-Hwang joined the Urgent Care Department at the Pesetas Multi-Specialty Clinic. She completed the Post Baccalaureate Pre-Medical Program at Goucher College in Maryland and later received her Doctor of Osteopathic Medicine at Touro College in New York. She recently completed her residency in family medicine at the University of Wisconsin. Dr. Harris-Hwang is originally from Malibu, CA and enjoys gardening, outdoor activities, and cooking.



Justin Hwang, DO

FAMILY MEDICINE

Dr. Hwang joined the Goleta Family Medicine office at 122 S. Patterson Ave. He completed his Doctor of Osteopathic Medicine at Touro College and completed his residency in family medicine at the University of Wisconsin. He is certified by the American Osteopathic Board of Family Medicine. Dr. Hwang grew up in Pasadena, CA and enjoys working on cars, sewing, and backpacking in his free time.



Kevin Kapadia, MD

NEUROLOGY

Dr. Kapadia, board-certified neurologist, joined the Neurology Department at the Pueblo Multi-Specialty Clinic. Dr. Kapadia earned his medical degree at Wayne State University School of Medicine in Detroit. He then went on to the University of Wisconsin Hospitals and Clinics where he completed his neurology residency and a fellowship in clinical neurophysiology. Since completing his fellowship in 2014, Dr. Kapadia has worked as a neurologist in a general neurology group practice in Wisconsin performing both in-patient and out-patient neurology consultation.



Jeffrey Kim, MD

FAMILY MEDICINE

Dr. Kim joined the Goleta Family Medicine office at 122 S. Patterson Ave. Dr. Kim is a board-certified family physician. He earned his medical degree from Boston University School of Medicine and then went on to complete his residency in family medicine at the University of Washington in Seattle. For the past several years Dr. Kim has been working as a family practitioner in Alaska in ambulatory care settings, emergency rooms and urgent care clinics.



Winifred Leung, MD

ADVANCED IMAGING SERVICES

Dr. Leung joined the Imaging Services Department housed at the Pesetas and Pueblo Multi-Specialty Clinics. She is a fellowship-trained breast radiologist who has been practicing in Santa Barbara for the past 10 years. Dr. Leung earned her medical degree at Drexel University College of Medicine and completed her internship, residency and fellowship at University of Wisconsin Clinical Science Center in Madison, WI. As an early adopter of tomosynthesis and whole breast ultrasound, she specializes in all aspects of breast imaging including MRI and image-guided biopsy. She is the current chair of the Santa Barbara Breast Care Alliance, an NAPBC-accredited “breast center without walls” of which Sansum Clinic and Ridley-Tree Cancer Center are founding participants.



Sean McGuinness, MD

HOSPITALIST

Dr. McGuinness joined the Sansum Clinic Hospitalist Department housed within Santa Barbara Cottage Hospital. He earned his medical degree at St. George University in Grenada and completed his internal medicine residency at Cottage Hospital where he has been working alongside many of our other experienced hospitalists.

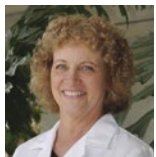
New Sansum Clinic Physicians & Providers



Anne McMullen, NP

CARDIOLOGY

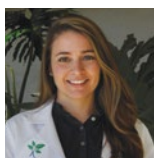
Ms. McMullen (formerly Anne Purcell) joined the Cardiology Department at the Pueblo Multi-Specialty Clinic. She received her Master of Science in Nursing from Regis College in Weston, MA, and is certified by the American Academy of Nurse Practitioners. McMullen has worked in various specialties including internal medicine, cardiology, and urgent care. She is certified to teach English as a foreign language and has working knowledge of Spanish in the medical field.



Lesa Morby, CRNA

ANESTHESIA

Ms. Morby joined the Anesthesiology Department at the Foothill Surgery Center at Sansum Clinic. She received her Doctorate in Nursing from Rush University Medical College in Chicago, IL and is a member of several professional organizations including the American Association of Nurse Anesthetists, Ophthalmic Anesthesia Society, Sigma Theta Tau International Honor Society of Nursing, and the California Association of Nurse Anesthetists.



Stefanie Rashti, CRNP

PALLIATIVE CARE AND ADVANCED CARE PLANNING

Ms. Rashti joined the Palliative Care and Advanced Care Planning Department housed at Ridley-Tree Cancer Center at Sansum Clinic. Stefanie earned her Master of Science in Nursing and Adult Gerontology-Acute Care Nurse Practitioner degree at the Thomas Jefferson University in Philadelphia. She is currently enrolled in the Doctor of Nursing Practice Program at West Chester University of Pennsylvania. Prior to joining Sansum Clinic, she worked at Thomas Jefferson University Hospital in Philadelphia as a palliative care inpatient nurse practitioner.



Damien Ray, MD

URGENT CARE

Dr. Ray joined the Urgent Care Department at the Pesetas Multi-Specialty Clinic. He received his medical degree from the College of Medicine at the University of Vermont and completed his residency at St. Anthony North Hospital in Westminster, CO. Dr. Ray grew up in Wyoming and Colorado and enjoys many hobbies including hiking, skiing, sailing, mountain biking and classic Volkswagen restoration.



Andrew Reardon, MSPT

PHYSICAL THERAPY

Mr. Reardon joined the new Physical Therapy Department at 5385 Hollister Avenue in Goleta. He received his medical degree from the University of Kentucky in Lexington, KY. Reardon previously worked in Tennessee where he spent most of his life. Andy loves cycling, hiking and the outdoors.



Navdeesh Reiners, MD

OBSTETRICS & GYNECOLOGY

Dr. Reiners, board-certified obstetrician and gynecologist, joined the Obstetrics & Gynecology Department at the Pueblo Multi-Specialty Clinic. She earned her medical degree at the University of California, San Diego School of Medicine and completed her residency at University of California, Los Angeles (UCLA) Medical Center. Dr. Reiners also earned a Master of Public Health from UCLA with a concentration in population and reproductive health. Dr. Reiners most recently worked as a Clinical Assistant Professor at Stanford University School of Medicine providing both in-patient and out-patient Ob/Gyn care at Stanford University Medical Center.



Cardy D. Romero, MD

OCCUPATIONAL MEDICINE

Dr. Romero joined the Occupational Medicine office at 101 S. Patterson Ave. He received his medical degree from The University of Iowa and completed his family medicine residency at West Suburban Medical Center in Oak Park, IL. He has more than 30 years of experience in the medical field. He is certified by the American Board of Family Medicine and the American Board of Medical Acupuncture.



Tina Schukart, PA

SURGERY

Ms. Schukart joined the Surgery Department at the Pueblo Multi-Specialty Clinic. Tina earned her Master of Public Health in epidemiology at the University of California, Los Angeles. She then went on to complete her Master of Physician Assistant Practice at the University of Southern California. She has worked in several different practice settings in south/central California, most recently at American Indian Health & Services in Santa Barbara where she managed care for patients in family medicine, women's health and geriatrics.



Shiela Tungol-Laffie, NP

FAMILY MEDICINE

Ms. Tungol-Laffie returned to the Family Medicine Department at the Pesetas Multi-Specialty Clinic in December 2019 after completing her Post-Master's Family Nurse Practitioner program at Western University of Health Sciences in Pomona, CA and her Master of Science in Nursing from California State University, Fullerton. She is a member of the American Association of Nurse Practitioners and Sigma Theta Tau International Honor Society of Nursing.



Kirsten Wagner, MD

OPHTHALMOLOGY

Dr. Wagner, board-certified cornea specialist, joined the Ophthalmology Department at the Foothill Elings Eye Center. She earned her medical degree from Georgetown University School of Medicine in Washington, DC where she went on to complete her ophthalmology residency and serve as chief resident. Dr. Wagner completed a cornea and external eye disease fellowship at Wake Forest Baptist Health University Medical Center in North Carolina.



Cori Wright, NP

PAIN MANAGEMENT

Ms. Wright joined the Pain Management Department at 3916 State Street. She received her Masters of Science in Nursing from Pennsylvania State University followed by her Doctor of Nursing Practice from Chamberlain University College of Nursing in Illinois. Wright is certified by the American Academy of Nurse Practitioners. Her prior specialized experience includes internal medicine, pain management and addiction medicine.



Emanuel (Manny) Zusmer, MD

PAIN MANAGEMENT

Dr. Zusmer joined the Pain Management Department at 3916 State Street. Dr. Zusmer earned his medical degree from the University of Miami School of Medicine and completed his anesthesia residency at the University of California at San Francisco. Dr. Zusmer worked with the Anesthesia Associates Medical Group in Santa Barbara for five years before transitioning to pain management. Dr. Zusmer completed his pain management fellowship at Oregon Health and Science University.

Sansum Clinic by the Numbers



Total Insurance Counts

Insurer	Total Patient Visits
Commercial	48,550
Government	1,972
HMO	106,086
Indemnity	5,094
Managed Care	29,754
Medicaid	35,364
Medi-Cal	8,677
Medicare	215,463
Medicare Advantage	17,556
Other	13,069
PPO	180,296
Worker's Compensation	2,409
Sansum Clinic Charity Care	824
Grand Total	665,114

Total Patient Visits
665,114 Visits

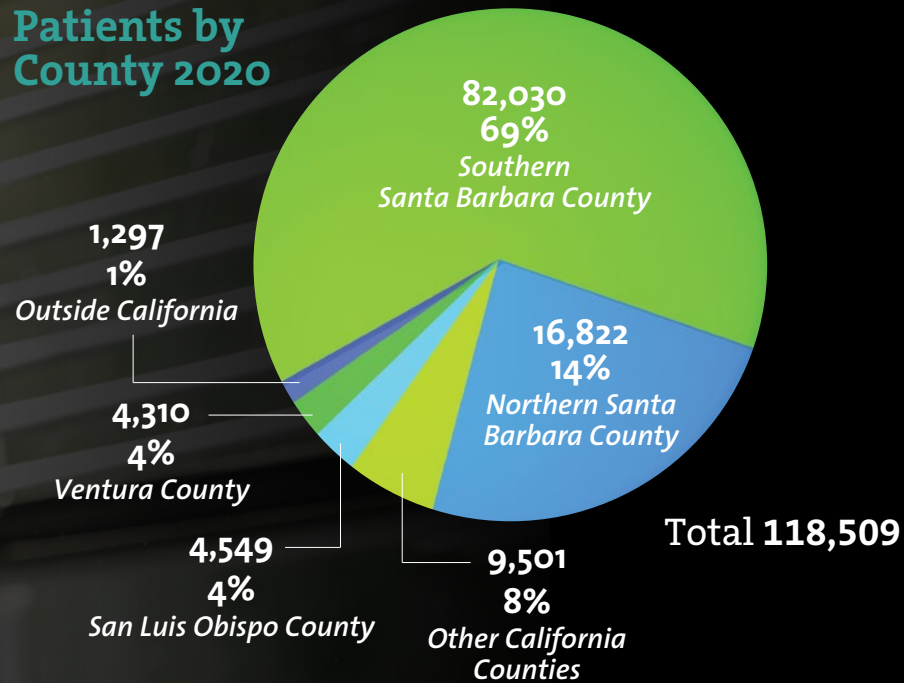
Distinct Patient Count
118,509 Patients

Total Visits by Department

Specialty	Total Visits	Distinct Patients
Allergy & Immunology	7,179	3,232
Cardiology	33,829	12,042
Dermatology	27,969	16,791
Endocrinology	18,707	9,663
Ear, Nose, Throat	11,586	6,497
Facial Plastic Surgery	731	476
Family Medicine & Internal Medicine	111,340	53,803
Gastroenterology	13,847	9,142
General Surgery	4,981	2,695
Genetic Counseling	963	658
Health Education	2,260	1,201
Infectious Diseases	2,098	1,236
Medical Oncology	49,398	8,004
Nephrology	3,191	1,612
Neurology	10,460	6,562
Neurosurgery	278	260
Nuclear Medicine	5,293	3,759
Nutrition	2,437	821
Obstetrics & Gynecology	24,849	11,060
Ophthalmology	39,254	14,457
Optometry	6,051	4,714
Orthopedic Surgery	19,181	7,894
Pain Management	4,657	1,573
Pediatrics & Adolescent Medicine	28,679	11,709
Physical Therapy	18,486	4,002
Podiatry	11,825	5,419
Psychiatry & Psychology	14,470	3,287
Pulmonary & Critical Care	12,224	4,335
Radiation Oncology	10,563	1,636
Radiology	72,405	39,629
Rheumatology	14,044	5,352
Sleep Medicine	6,092	4,014
Social Work	1,179	334
Surgical Oncology	3,531	1,635
Urgent Care	44,839	30,454
Urology	16,820	7,718
Weight Management	1,051	232
Other	8,367	5,750
Total Patient Visits	665,114	118,509



Patients by County 2020



*Outpatient visit counts utilizing Centers for Medicare & Medicaid Services (CMS) criteria for Meaningful Use reporting for face-to-face encounters with a physician or advanced practice provider (physician assistant or nurse practitioner), including office visits, treatment, initial consult, procedure visit, routine prenatal visit, initial prenatal, postpartum visit, surgical consult, follow-up, pre-op, rounding-rehabilitation and extended care, telemedicine, anticoagulation clinical support, and procedure only.

Total Medicare Visits by Department*

Specialty	Total Visits	Distinct Patients
Allergy & Immunology	4,139	3,091
Ambulatory Surgical Center	5,826	3,921
Anticoagulation	464	128
Cardiology	13,162	7,441
Dermatology	26,225	16,233
Endocrinology	16,128	9,391
Facial Plastic Surgery	1,441	861
Family Medicine & Internal Medicine	102,133	50,711
Gastroenterology	12,029	8,949
General Surgery	4,245	2,571
Infectious Diseases	1,695	1,025
Medical Oncology	19,571	5,462
Nephrology	2,869	1,594
Neurology	10,190	6,466
Obstetrics & Gynecology	23,569	10,688
Ophthalmology	25,609	11,411
Optometry	7,482	5,735
Orthopedic Surgery	18,639	7,763
Otolaryngology	8,959	5,797
Pain Management	4,433	1,553
Palliative Care	1,023	315
Pediatrics & Adolescent Medicine	21,323	9,957
Podiatry	10,895	5,114
Psychiatry	12,545	2,342
Pulmonology & Critical Care	8,740	4,046
Radiation Oncology	5,385	1,607
Rheumatology	11,979	5,295
Skilled Nursing	2,356	480
Surgical Oncology	3,407	1,609
Urgent Care	30,464	21,934
Urology	15,113	7,529
Weight Management	443	99
Total Medicare Visits	432,481	106,405



Financial Statements 2020

Balance Sheet

Assets

Current Assets

Cash and short-term investments	\$32,219,116	\$30,068,538
Patient accounts receivable	\$30,143,442	\$28,888,752
Other current assets	\$6,899,609	\$7,651,242

Total current assets	\$69,262,167	\$66,608,532
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Property, plant and equipment, net of

accumulated depreciation and amortization	\$65,178,898	\$67,098,243
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Other Assets

Other assets	\$19,332,767	\$18,866,784
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Total Assets

	\$153,773,832	\$152,573,559
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Liabilities and Net Assets

Current Liabilities

Accounts payable and accrued expenses	\$43,179,705	\$39,898,848
Current portion of long-term debt	\$4,037,304	\$4,153,492

Total current liabilities	\$47,217,009	\$44,052,340
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Long-Term Liabilities

Long-term debt	\$30,581,976	\$33,676,225
Other long-term liabilities	\$14,117,833	\$12,820,236

Total long-term liabilities	\$44,699,809	\$46,496,461
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Net Assets

Unrestricted	\$57,946,014	\$57,307,065
Restricted	\$3,911,000	\$4,717,693

Total Net Assets	\$61,857,014	\$62,024,758
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	\$153,773,832	\$152,573,559
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Leti Gutierrez, Medical Assistant Lead, prepares to greet patients at Urgent Care with a warm welcome

Statement of Cash Flows

2020 2019

Cash flows from operating activities

Increase in net assets	\$(167,744)	\$9,935,279
Depreciation and amortization	\$8,395,146	\$8,451,539
Other changes in operating assets and liabilities	\$1,757,692	\$(11,925,869)
Net cash provided by operating activities	\$9,985,094	\$6,460,949

Cash flows from investing activities

Net cash used in investing activities	\$(6,952,646)	\$(1,136,639)
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Cash flows from financing activities

Net cash provided/used in financing activities	\$(2,192,908)	\$(5,176,975)
Net change in cash and cash equivalents	\$839,540	\$147,335
Cash and cash equivalents, beginning of year	\$22,374,596	\$22,227,261
Cash and cash equivalents, end of year	\$23,214,136	\$22,374,596

Statement of Operations

2020 2019

Revenues

Net patient service revenue	\$250,946,071	\$260,560,532
Premium revenue	\$62,884,697	\$67,171,865
Other revenue	\$25,193,836	\$13,823,339
Total unrestricted revenues, gains and other support	\$339,024,604	\$341,555,736

Expenses

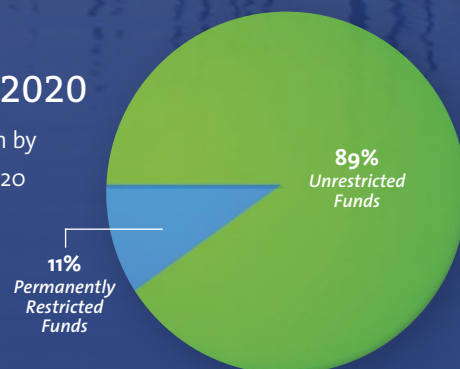
Medical service contracts	\$92,457,769	\$100,883,574
Salaries and employee benefits	\$88,279,487	\$87,409,970
Medical and professional expense	\$123,107,159	\$114,267,104
Occupancy expense	\$12,671,043	\$11,923,350
Other expenses	\$22,039,368	\$21,207,988
Total expenses	\$338,554,826	\$335,691,986

Operating Income

\$469,778 \$5,863,750

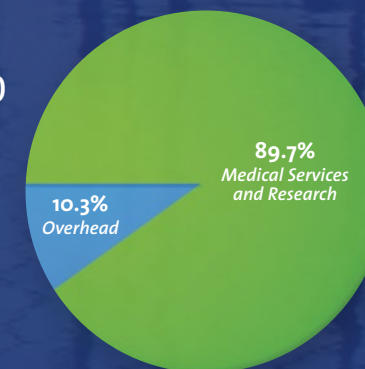
Endowment Funds 2020

Endowment net asset composition by type of fund as of December 31, 2020 was as follows:



Functional Expenses 2020

Sansum Clinic provides general healthcare services to residents within its geographic location. Expenses related to providing these services for 2020 are as follows:



Philanthropic Support

During unprecedented times like these our focus remains on our patients and the community. The coordination, cooperation and personal sacrifices of our physicians and staff during this global pandemic have undoubtedly saved lives. There are hundreds of unsung heroes whose names you may never know, but whose masked faces you routinely see at Sansum Clinic and the Ridley-Tree Cancer Center.

Many individuals and businesses stepped up to help during the pandemic and with their support we established the **Pandemic Relief Fund**. The fund helped with the purchase of personal protective equipment and the expenses associated with setting up the largest COVID-19 testing site on the central coast. It was also used to cover the costs of the vaccination clinics that were held after hours and on the weekends during the December holidays.

Medical excellence is never-ending. 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.

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, over recent years, 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 four-year anniversary in September 2021.
- **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 215 Pesetas Lane, and increased our medical staff to include more than 70 primary care physicians Clinic-wide.
- **Recruit 37 physicians**, over the last decade, utilizing shared appreciation home loans as part of the **Physician Housing Program** supported by Sansum Clinic's **Lovelace Fund for Medical Excellence**, resulting in a medical staff of **more than 150 specialists** in **nearly 40 specialties**.
- **Modernize our facilities** to enhance the patient experience at the **Pediatrics and Adolescent Medicine** and **Allergy Departments** on Hitchcock Way; **Obstetrics and Gynecology** on Pueblo Street and the **Oncology Department** in Solvang.
- **Relocate our Physical Therapy Department** from Foothill Medical and Surgical Center to a new modern facility at 5385 Hollister Avenue. The PT move allows us to expand our busy Urology Department into the space that PT vacated.
- Current plans call for the **increase from four to six operating rooms** at the Foothill Surgery Center to meet our growing demand for outpatient surgery.
- **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 **11 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 hosting Camp Wheez**, the 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** and free eye care through our partnership with **SEE International**.
- Offer **Health Education Programs** free or at a nominal fee.

Our donors are an important partner in our current and future success. Working together we can continue to better serve you, our patients and the community.

We are truly grateful for every gift we receive, no matter the amount. Your support contributes to good health for everyone.

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

Philanthropy at a Glance

Capital	\$ 107,668
Endowment Programs	\$ 29,551
Lovelace Fund for Medical Excellence	\$ 482,939
Programs and Operations	\$ 2,276,307
Where the Need is Greatest	\$ 569,453
Ridley-Tree Cancer Center	
Support from Cancer Foundation of Santa Barbara	\$ 2,966,888
Public support for Ridley-Tree Cancer Center directed to Sansum Clinic	\$ 1,826,283
Transfers from Sansum Clinic to Cancer Foundation of Santa Barbara	\$ (1,826,283)
Total Philanthropic Support	<u>\$ 6,432,806</u>

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 well-being 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.





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 118,000 patients** who trusted us with their medical care last year. It also enables the Clinic to keep pace with the rapidly changing healthcare environment, and anticipating the community's needs.

Physician Housing Program

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

This program assists new physicians in obtaining shared appreciation loans to help with the purchase of homes in our high-priced real estate market. The **32 physicians who used loans last year saw 27,960 unique patients at 68,230 patient visits** in specialties that included Cardiology, Dermatology, Family Medicine, Gastroenterology, General Surgery, Infectious Diseases, Internal Medicine, Neurology, Obstetrics and Gynecology, Oncology, Ophthalmology, Orthopedics, Pain Management, Palliative Care, Psychiatry, Pulmonary/Critical Care, Rheumatology, Sleep Medicine and Surgical Oncology. One of these physicians was named **Physician of the Year** at **Cottage Health** in recognition of his exemplary performance.

Physician recruitment is ongoing even during a global pandemic. Last year we brought three new physicians to the Clinic in the areas of Occupational Medicine, Ophthalmology and a Hospitalist all of whom have been offered a loan from the Physician Housing Program.

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.



I had the pleasure of joining Sansum Clinic in 2013. The Lovelace Fund for Medical Excellence and the Physician Housing Program was a significant factor in my decision process. Coming out of my residency with student loan debt, and hoping to find a permanent home while starting a family, can be very daunting. This is more acutely the case in a market like California and more specifically Santa Barbara. On top of this, qualifying for a loan as a newly minted physician without past years of significant income generation, can be difficult and discouraging. The Physician Housing Program was only offered at Sansum Clinic compared to my other job offers. This is an example of why Sansum is so special. It shows their dedication to physician success and higher recruitment ability for quality providers.

Through this program I was able to purchase a home in Santa Barbara that my family and I still live in and love. Sansum Clinic was also very open about the program and was easy to work with when refinancing and paying back this loan.

This is an incredible tool to recruit and retain highly talented physicians to this special community.

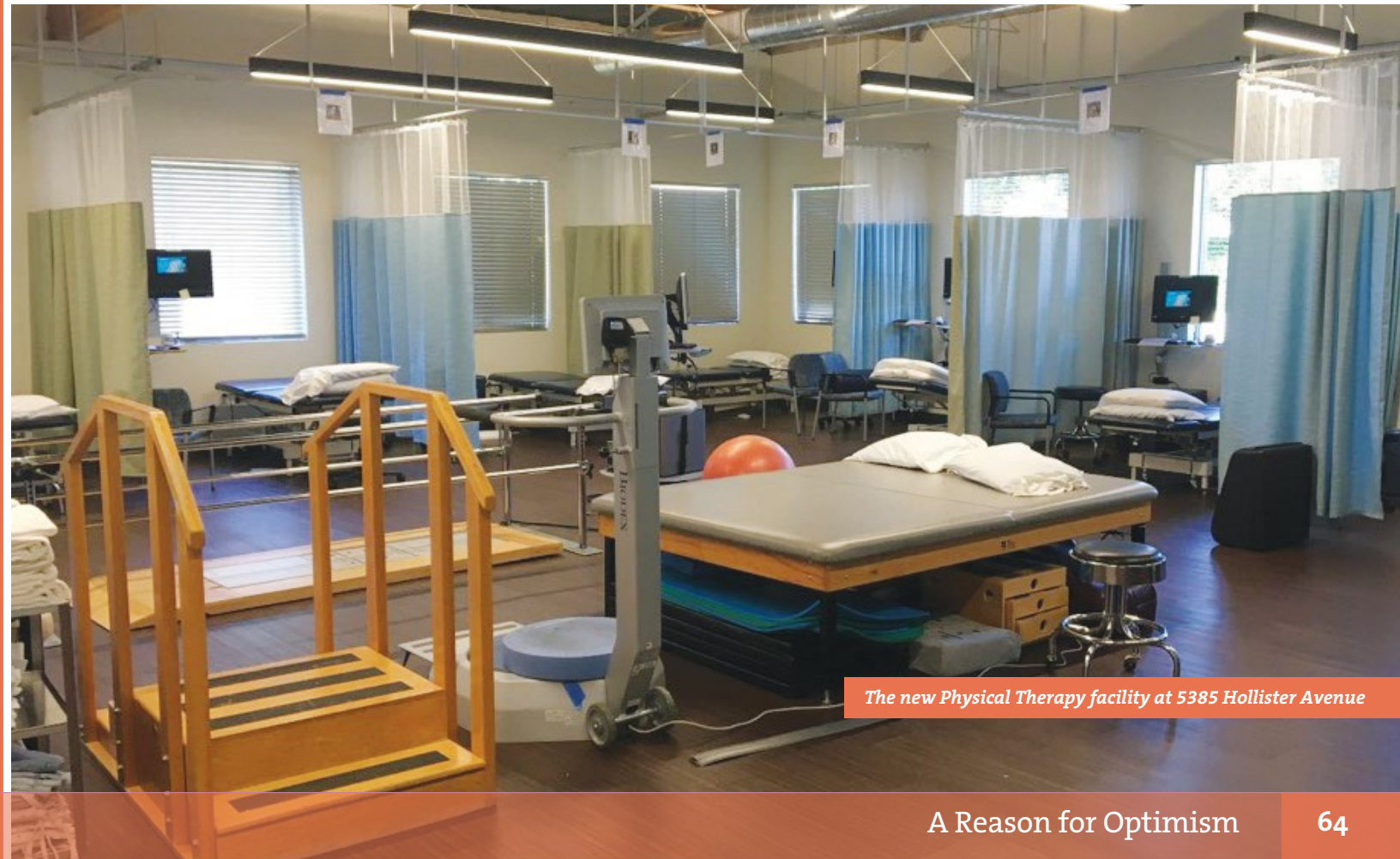
— BRYCE HOLDERNESS, MD
INTERNAL MEDICINE

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.

In early 2020, our **Physical Therapy (PT)** department moved from the Foothill Medical and Surgical Center to a new modern facility at 5385 Hollister Avenue across from Sansum's Corporate office. This new space was designed to meet the needs of a broad range of PT patients. The PT move allowed us to expand our busy Urology Department into the space that PT vacated. In 2021 our plan is to increase our Foothill Surgery Center from four to six operating rooms 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.



The new Physical Therapy facility at 5385 Hollister Avenue

Thank You to Our Donors

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

VISION

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

VALUES

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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