

100 Years OF MEDICAL EXCELLENCE

sansumSM
CLINIC
for your good health

2021 Annual Report





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

Dear Patients and Donors,

Sansum Clinic opened its doors **100 years ago** as one of the earliest multi-specialty practices in the country, and we remain the largest independent nonprofit outpatient healthcare organization between Los Angeles and the San Francisco Bay area. Our history is actually a tale of two clinics merging, one founded by **Dr. William Sansum**, the first U.S. physician to both develop and administer insulin for diabetes, and the other created by doctors whose battlefield triage collaboration became a concept they incorporated into their Santa Barbara practice. Using novel and innovative approaches to effectively and affordably treat patients still serves as our foundation today. While our centennial celebration was more muted than we had hoped due to the pandemic, we are so proud that this season again illuminated our Clinic's longstanding dedication to serve our community with excellence.

Spanning more than **50 specialties and service lines**, we care for more than **100,000 patients across 23 different locations**. Santa Barbara has always been advanced in the medical sciences despite its small size. This tradition progressed in 2021 in great part due to our commitment to harness the power of the latest technology and treatments available to treat patients, who reap the life-changing benefits. From our top-of-the-line surgery centers and imaging machines to the world-class **Ridley-Tree Cancer Center**, our investments in infrastructure and innovation are our hallmark. This level of advancement now extends into the most evolved forms of digital and virtual patient communication. From growing the use of **Telehealth**, to expanding **MyChart** offerings like online bill pay and appointment scheduling, to fully-utilizing the **WELL™** text platform to better inform and remind patients, we constantly push through barriers to increase access and improve customer service.

All of this would not have been possible without the tremendous philanthropic support we receive. Since our earliest days, strong ties to our community and the generosity of many within it have brought about these state-of-the-art advancements. Important partnerships guided by our Clinic leaders and Trustees have created deep bonds and provided great dividends. Support from partners like the **Cancer Foundation of Santa Barbara** have birthed many

groundbreaking civic efforts to enhance health and overall quality of life here, and for that, we are grateful.

2021 began and ended with a **surging pandemic**. As we reflect back on the year, we are deeply proud of the way our Clinic simultaneously fought COVID-19 while still delivering the essential care our community needed. Our **1,200 team members** and **220+ physicians** proved their steadfast commitment to our patients. Our hospitalists and pulmonologists cared for the most fragile people battling COVID-19. Urgent Care staff treated COVID-19-positive patients and tested for the virus in the county's first drive-up appointment-based COVID-19 testing operation. An army of doctors, nurses and medical assistants ran countless COVID-19 vaccine clinics, often after their day shifts or on weekends. We could fill this report with stories about team members who resolved to serve, even when confronted with risks to their own personal health and that of their families. Our **Telehealth program**, born of the pandemic and launched in just weeks during 2020, cemented its place as a permanent option for care in 2021. Our strong partnership with the **Santa Barbara County Public Health Department** allowed us to participate in critical decisions on how our community was protected from the virus.

Our highly-trained staff, and residency or fellowship-trained physicians with education from esteemed institutions are leaders in their fields. In 2021, they rose above challenging circumstances to deliver personal, compassionate care to patients. This level of high-quality care garnered our Clinic recognition and accreditations from state and federal agencies. We demonstrated our capacity to uphold the highest standards of quality, ethics and professionalism by achieving:

- **5-out-of-5 star rating** for overall patient experience during 2021 from **California's Office of the Patient Advocate**



- **Top 10% performance** in patient experience for commercial HMO members from the **Integrated Healthcare Association**, ranking us alongside other large integrated health systems like **Cedars-Sinai, Sutter Health,** and **Scripps Health.**
- **Reaccreditation of Ridley-Tree Cancer Center's Radiation Oncology Department** by the **American Society for Radiation Oncology** for its focus on safety, quality, and adherence to patient-centered care. Ridley-Tree is one of only 23 facilities in the State with this accreditation, and **the only one on the Central Coast.**
- **Breast Imaging Center of Excellence** designation from the **American College of Radiology** proving Sansum Clinic met the highest standard in stereotactic breast biopsy, breast ultrasound and ultrasound-guided breast biopsy, breast MRI and mammography.

As COVID-19 is appearing to be more manageable, we are excited to turn focus to planning and preparing to care for our community for another 100 years. This includes: considering a **capital project in Solvang** to expand our primary and specialty care services for Santa Ynez Valley residents; **construction at our Foothill Surgery Center** to better meet the growing demand for outpatient surgery in our community; and a plan in motion to **establish a Breast Imaging Center** to enhance the experience of the tens of thousands of women who have come to rely on us for important screenings each year.

As always, our greatest asset is our people, and together, we are committed to delivering on our mission of providing an excellent healthcare experience, recognizing our first priority is the patients we serve.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Arnold Schaffer', written over a light blue horizontal line.

Arnold Schaffer
Chairman, Board of Trustees

A handwritten signature in blue ink, appearing to read 'Kurt Ransohoff', written over a light blue horizontal line.

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

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Human Resources: Focused on Our Future
Population Health
A Fresh Start in Compliance
Information Security as a Strategic Investment
IT Teams Provide Essential Connectivity



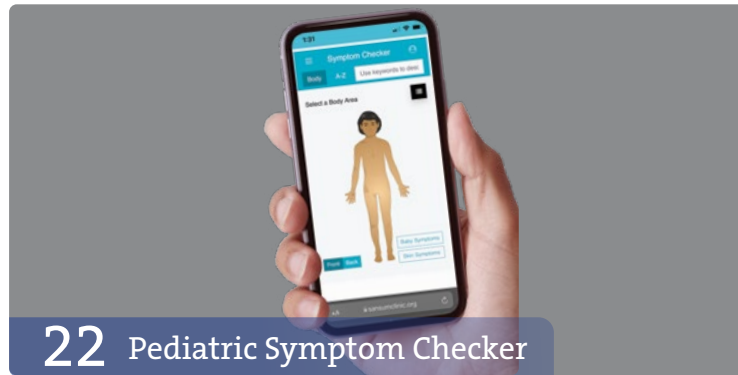
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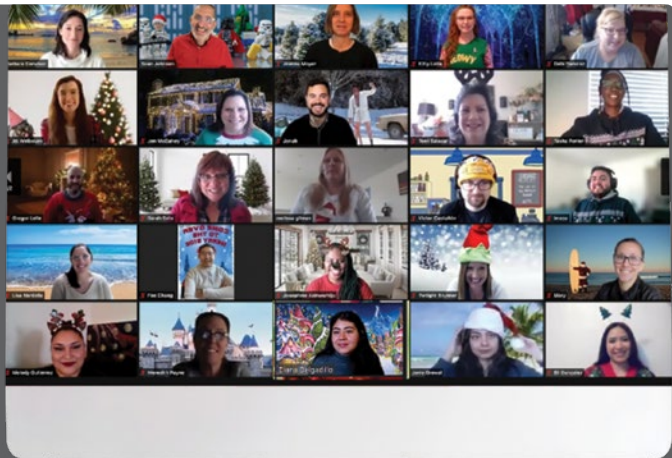
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COVID-19 by the Numbers

FROM MARCH 2020 TO APRIL 2022



202,956
Telehealth Visits



24,488
Vaccinations for Adults



997
Vaccinations for Children



94,812
COVID Tests Performed



Marjorie Newman, MD
Sansum Clinic Medical Director



The Sansum Clinic Hospitalist Department cared for our community's sickest patients at Santa Barbara Cottage Hospital during the pandemic

Santa Barbara Medical Clinic expands with a 3,200 square foot **Surgical Wing**. Among 3 news specialists is **Dr. Lawrence Eder**, one of the first board-certified OB/GYNs in the U.S.

Dr. Sansum is first physician in U.S. to both develop **lifesaving insulin** and successfully treat a diabetic patient. Santa Barbara becomes a medical destination for diabetics nationwide.

Santa Barbara Medical Clinic opens. Founder **Dr. Rexwald Brown** believes a team approach could provide better healthcare more affordably by pooling resources, skills and costs - a novel premise at the time.

Dr. William David Sansum recruited to Santa Barbara to head **Potter Metabolic Clinic**, treating diabetes and metabolic disease (gout, nephritis).

Carnegie Foundation funds the move of the **Potter Metabolic Clinic** to Santa Barbara.

Sansum Medical Clinic opens as a private clinic with a focus on diabetes and related metabolic disease, staffing six physicians.

Santa Barbara Medical Clinic is one of **earliest multi-specialty practices** in the country. **Chapala Street building** is **annexed** to provide additional 1,538 square feet.

Famed architect **Carleton Winslow** designs a clinic remodel in the **Italian Venetian style** adding **second story** and 4,200 square feet.

New Sansum Medical Clinic built across from **Cottage Hospital** to treat patients who don't require hospitalization with latest research and medical advances.

Santa Barbara Medical Clinic physicians publish articles in **more than 30 scientific and medical journals** in the Clinic's first 10 years.

Founder **Dr. Rexwald Brown** is 1 of 11 physicians nationwide to serve on **FDR's Medical Advisory Board** for the Committee on Economic Security.

The **endocrine research** of Sansum Clinic's **Dr. Alfred Koehler** - years ahead of its time - shows relationship between cholesterol and arteriosclerosis.

Santa Barbara Medical Clinic doctors are called to military service. Remaining staff works overtime to handle patient load in town, as well as helping with military personnel at Marine air base.

Non-profit Sansum Medical Research Foundation is established for full-time research; Clinic doctors desiring to keep a connection with research serve on the board.

Dr. Sansum dies. Six physicians buy the clinic from the Sansum estate and continue as a partnership in his name.



Sansum Clinic, founded in 1921, is one of the oldest non-profit outpatient clinics in California.

Located in Santa Barbara, Sansum Clinic is the largest independent non-profit outpatient healthcare organization between Los Angeles and the San Francisco Bay Area.

Despite its size, Santa Barbara has always been an astonishingly advanced community in the medical sciences.

In 1891, the town of just 5,800 residents built its own community hospital. One of the nation's first X-ray machines was installed in Santa Barbara in 1896. And in 1922, Santa Barbara became the first U.S. location to produce insulin and treat diabetics.

Today, Sansum Clinic has 220 physicians in more than 50 specialties and service lines, caring for more than 119,000 patients at 500,000 visits annually.



● Sansum Medical Clinic ● Santa Barbara Medical Clinic ● Joint Entity Now Sansum Clinic

1948 To meet the needs of a post-war growing community, the clinic staffs **20 physicians**. Sansum Medical Clinic is remodeled and expanded with a **9,000 square feet addition**.

1955 Sansum Medical Clinic brings in more specialists, becoming a **diversified multi-specialist group**.

1960 Sansum Medical Clinic's **Dr. Casimir Domz** pioneers the **first successful bone marrow transplant** in a patient with an immune deficiency.

1962 Husband-wife researchers, **Drs. Francis and Mariana Masin** are hired to do specialty laboratory testing, become **pioneers in the field of cytology**.

1967 **New, modern Santa Barbara Medical Clinic** is built at **Pesetas Lane** to serve growing population.



1973 Santa Barbara Medical Clinic becomes a nonprofit foundation: **Santa Barbara Medical Foundation Clinic**.

Sansum Clinic leadership, staff and physicians successfully navigate COVID-19 pandemic to care for more than 100,000 individual patients in person and via Telehealth.

Sansum Clinic and Cancer Foundation of Santa Barbara join forces in partnership to create the Ridley–Tree Cancer Center at Sansum Clinic, providing world class services and treatment.

Sansum Clinic has earned state and national recognition for medical quality, including *Elite Status* from California Association of Physician Groups.

Sansum Clinic Medical and Surgical Center and Sansum Clinic Elings Eye Center opens on Foothill Road. Foothill Surgery Center at Sansum Clinic is fully-accredited state-of-the-art outpatient surgery.

2020

2018

2015

2014

2021

2012

2011

2010

2008

2008

2006

1998

1990

1988

1987

1985

1985

Sansum Clinic celebrates

100

— YEARS OF —
MEDICAL EXCELLENCE



Cancer Center of Santa Barbara's physicians and staff merge with Sansum Clinic to advance the level of cancer care in the community.

Sansum Clinic announces accreditation of its new *Echocardiography Laboratory*, the first in Santa Barbara County.

Sansum Clinic transitions from paper charts to *electronic health records*.

Philanthropist *Leatrice Luria* supports the work at Sansum Clinic by funding two state-of-the-art *digital mammography machines*.

Impressed with Sansum Clinic's physicians, philanthropist *Virgil Elings* funds colonoscopy screenings for people without insurance in a community outreach program, collaborating with *Santa Barbara Neighborhood Clinics*.

Name is shortened to less cumbersome "*Sansum Clinic*"—in keeping with the names of similar institutions such as the *Mayo Clinic* or *Cleveland Clinic*.

Santa Barbara Medical Foundation Clinic and *Sansum Medical Clinic* merge and is renamed *Sansum-Santa Barbara Medical Foundation Clinic*.

Sansum Medical Clinic draws patients from *every state in the union* and more than 20 foreign countries.

Santa Barbara Medical Foundation Clinic Internist *Dr. Erno Daniel* becomes one of the first U.S. physicians certified in the specialty *Geriatric Medicine*.

Sansum Medical Clinic becomes one of the first clinics in the nation to acquire a *color flow doppler electrocardiogram machine* to diagnose heart disease.

Santa Barbara Medical Foundation Clinic establishes *Goleta office*.

Several hundred clients sign on for *Sansum Clinic's* newly-launched "*Weight Control for Life*"—a medically-supervised diet program.

1976

1979

1980

1981

1981

1982

1985

With 50 physicians on staff, *Sansum Medical Clinic* outgrows space. A new facility is built on *Pueblo Street*.

Santa Barbara Medical Foundation Clinic is certified as a *Health Maintenance Organization (HMO)*.

Grateful patient *Edward A. Rykenboer* makes \$1.6 million bequest, which is used to construct new *Rykenboer Pavilion wing* at *Pesetas Lane*.

Undersea medicine specialist *Dr. Paul Linaweaver* and *Dr. Hugh Greer* develop one of the first *Diving Medicine Departments*, operating a hyperbaric decompression chamber.

To meet the health needs of patients throughout the county, *Santa Barbara Medical Foundation Clinic* expands with satellite clinics. *Carpinteria branch* opens.

Lompoc branch of *Santa Barbara Medical Foundation Clinic* opens.

ADVANCEMENTS IN OPERATIONS



- New Oracle Cloud Enterprise Software
- Human Resources: Focused on Our Future
- Population Health
- A Fresh Start in Compliance
- Information Security as a Strategic Investment
- IT Teams Provide Essential Connectivity



New Oracle Cloud Enterprise Software

COMPASS WILL INTEGRATE HUMAN RESOURCES, FINANCE AND SUPPLY CHAIN MANAGEMENT PROCESSES

Our new enterprise software powered by **Oracle** and branded as **Compass**, will reduce many administrative burdens by integrating and automating a number of our key business functions. Compass will allow us to keep our technology current – avoiding stagnation of processes, and it supports best-in-class security features, such as encryption and virus scanning.

We went live with the first phase of functionality to integrate our **Human Resources, Finance** and **Supply Chain Management Processes** on January 1, 2022, and anticipate seeing ongoing enhancements and new features in Compass over time.

Compass automates back office processes and day-to-day business activities for our teams in **HR, Purchasing, Warehouse, Accounting** and **Payroll**. Additionally, Compass will replace our time-keeping application and procurement application. This means that all employees have one portal to access Compass to complete timecards, benefit enrollment and updates to personal information. Managers also access Compass for all hiring, supply ordering and payment activities. Compass can be accessed via desktop and mobile devices with a web browser, or via iOS and Android apps.

HUMAN CAPITAL MANAGEMENT MODULE FOR HUMAN RESOURCES

The **Human Capital Management** module of Compass allows us to use a more strategic approach to HR management across the organization, by streamlining HR resources, standardizing recruitment and development processes, and reducing costs.

Talent management features enable us to modernize the entire employee process from recruitment to learning and progression - or as we say, “*from hire to retire.*” Compass will allow us to consolidate the **HR workflow**, including recruiting, benefits, compensation, attendance, education and more, allowing for a more seamless relationship with each employee including self-service

functionality for both employees and managers.

Employee Self-Service will include things like entering time, requesting time off, and updating personal details such as marital status and home address.

Manager Self-Service will include things like promoting and transferring employees, approving time off requests, viewing team schedules, and reviewing salary and performance history, without having to log into different systems.

ENTERPRISE RESOURCE PLANNING AND SUPPLY CHAIN MANAGEMENT MODULES FOR FINANCE AND PURCHASING

The **Enterprise Resource Planning** and **Supply Chain Management** module of Compass will be used to plan, budget and report on financial results by providing a comprehensive view of finance and operations in real time.

It seamlessly connects and automates critical business processes including:

- **Cash management**
- **Epic financial integration**
- **Purchasing review and approval**
- **Accounts payable entry and matching, accelerating the period close**
- **Payment processing**

This will reduce time spent gathering, reconciling and validating data, allowing the finance team to work faster, more accurately, and reduce paper processing and storage.

The new system will also provide a streamlined approach to ordering, tracking and storing supplies, bringing us modern day warehouse management functionality.

This is a big step in modernizing our business processes and will give us opportunities for further automation in the future.

We are excited to continue to develop our Oracle functionality to meet the needs of the complex organization Sansum Clinic has become and who we grow to be in the future.



Human Resources: Focused on Our Future

In 2021, the **Human Resources Department** was busy navigating not only the needs of 1,200 staff members during a pandemic, but also what we have come to know as the “*Great Resignation.*” The Department focused efforts in multiple areas including compensation, recognition, advancement within the organization, and training. Here are a few key highlights from the year:

- **Increased our budget by 30%** to improve our annual market and compensation review, which in turn provided over \$1.5 million in additional pay distributed to our staff throughout 2021
- **Launched clinic-wide staffing plan**, filling **282 positions** in 4th quarter alone
- **Created leveling and career paths** in 8 departments
- **Increased educational opportunities for staff** through the addition of the new **Enterprise Learning & Development Program**
- **Created a training calendar** including two additional quarterly management training opportunities
- **Recognized 92 WE CARE Champions throughout the year**, in addition to two **WE CARE Team Awards** given to Patient Access and the COVID-19 vaccine teams
- **Reinstated *This Month at Sansum Clinic***, a monthly newsletter designed to keep staff and physicians connected and apprised of Clinic news
- **Established the WE CARE Ambassador Committee**
- **Created an internal transfer communications campaign** to highlight promotions and new opportunities
- **Added an additional interpreter course**

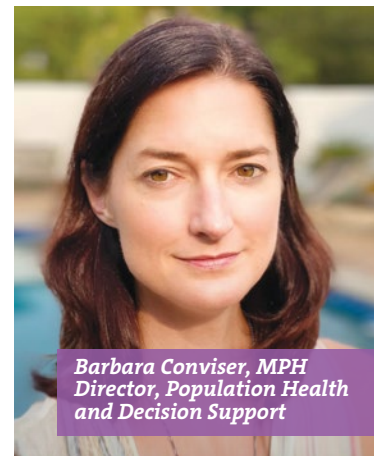
Population Health

Sansum Clinic’s Population Health Team wore many different hats in 2021. The experienced team of **RN Care Managers** and **Care Coordinators** exemplified Sansum’s continued commitment to **Value-Based Care**, even as they took on other responsibilities as COVID-related needs ebbed and flowed throughout the year.

The **Population Health** team adeptly handled **employee COVID triage**, which proved to be an ever-changing, complicated endeavor. The team’s work helped to ensure the safety of the Clinic’s employees and facilitated a rapid pathway to clearing employees back to work in accordance with **Public Health guidelines**. The team also jumped in where needed during staffing shortages across various primary care departments, helping with patient triage and other patient needs.

When not diverted to COVID related tasks, the Pop Health team focused on improving the overall health of Sansum’s patients. Due to the pandemic-related healthcare challenges of 2020 created by lockdowns and exposure risk, many of our patients delayed standard preventive care services and were behind in getting the care they needed to keep them healthy. Leveraging analytic tools in **The Wave** (Electronic Health Record) as well as telephone, **MyChart** and texting platforms, the team tackled this challenge through a series of targeted outreach approaches. Over **29,300 annual visits** took place during 2021 compared to **17,000 in 2020**. These visits are vital, both to ensure that preventive screenings occur on time, and to monitor any underlying conditions so they do not worsen. Partially due to these efforts, Sansum finished 2021 performing very well in the clinical quality measures upon which our **Health Plan partners** grade us.

In addition to annual visits and preventive care, the Population Health team developed a streamlined workflow for patients being discharged from the hospital. Research has shown that patients who follow up with their doctor within 14 days following a hospital stay are less likely to be readmitted. Outreach by a Population Health nurse to newly-discharged patients ensures that the **Transitional Care Management** visit (follow up with their doctor) occurs and connects the patient with services they may need to aid their recovery and continued health. This results both in better patient outcomes, and in reduced healthcare costs.



Barbara Conviser, MPH
Director, Population Health
and Decision Support

As we look to the future, the Population Health team will implement additional outreach and care management strategies particularly focused on our highest risk patients. The analytic tools within the **EHR** help us identify and track these patients so that a **Care Manager** can perform outreach or intervention as needed. Our Population Health nurses will guide patients towards the resources they need to maintain good health. This may entail simply setting up a doctor's appointment, or it may be connecting them with one of the many other population health-oriented resources at Sansum including, **Medication Management Pharmacists, Certified Diabetes Educators, Clinical Dietitians, Medical Social Workers, Palliative Care, Advanced Care Planning**, and many other services.

A Fresh Start in Compliance

2021 marked a year of significant change and growth for Sansum Clinic's **Compliance Department**, which tripled in size over the course of the year. Key activities in Compliance include **conducting investigations, establishing internal audits and monitoring, responding to external audits**, ensuring corrective action is taken when needed, instilling the fundamentals of compliance and privacy education, maintaining open lines of communication for staff reporting, and overall program evaluation.

In March 2021, Sansum Clinic hired a new **Compliance & Privacy Officer, Mara Sorkin**, to oversee and implement the organization's compliance, privacy, and ethics program. Early in the year, Ms. Sorkin identified seven key goals to focus on in 2021:

- 1 **Build Relationships**
- 2 **Learn the Organization**
- 3 **Optimize Policies & Workflows**
- 4 **Evaluate Organizational Risk**
- 5 **Establish Audits & Monitoring**
- 6 **Enhance Training & Education**
- 7 **Address Staffing and Resource Needs**

Committed to establishing a Culture of Compliance built on engagement and learning, she invested early in nurturing relationships across the clinic. "You can't

have an effective compliance program without the buy-in of the people it directly impacts," she noted, adding, "People have the wrong idea about Compliance, like the intent is punitive. It's really not. Much of our work involves listening, asking questions, and helping people understand how to do the right thing, the right way, everyday."

In the fall, Ms. Sorkin launched Sansum Clinic's first annual **Corporate Compliance & Ethics Week** – a celebration of ethical culture at Sansum Clinic. In addition to touring all of Sansum Clinic's facilities and departments, she used daily **Compliance Puzzles** to test staff and provider knowledge of the **Code of Conduct** and other key compliance and privacy topics.

Additional major achievements in 2021 included a complete overhaul of the organization's **Compliance and Privacy annual education modules**, establishment of an **Internal Audit function**, responding to **extensive payer audits**, implementing **corrective action in key risk areas**, and deploying a **Compliance Program Effectiveness Scorecard** to solicit feedback from all levels of the organization.

"I'm proud to be part of an organization so deeply committed to helping our patients and our community"

When asked about progress during her first year in the department, Mara shared that she loved, "Getting to meet people across the organization. It really drives home the importance of what we do every day and how hard everyone is working. I'm proud to be part of an organization so deeply committed to helping our patients and our community."



Mara Sorkin, MBA, CHC
Compliance & Privacy Officer

Information Security as a Strategic Investment

We are dependent on information technology networks and systems to securely process, transmit, and store electronic information and patient health records. We do so to communicate throughout the region and with our people, patients, business associates, and vendors. In the past, we have been fortunate to not experience data security incidents resulting from unauthorized access to our service providers' systems. In the future, we may experience unauthorized access, unauthorized acquisition of our data and our patients' data including: inadvertent disclosure, misconfiguration of systems, phishing, ransomware, or malware attacks. For example, **Solarwinds** was identified as a third party software vendor of ours that was a supply chain attack vector affecting numerous private and public organizations as well as governmental agencies. Our compensating controls and vulnerability program eliminated this supply chain threat in advance of its discovery.

In addition, our patients have experienced, and may in the future experience, breaches of systems and cloud-based services enabled by other healthcare entities within the region. To date these incidents have not had a material impact on our operations or patients'; however, there is no assurance that such impacts will not be material in the future. Incidents have in the past and may in the future have the impacts discussed below.

In providing services and care to patients, we often manage, utilize, and store sensitive or confidential data. This includes personal and proprietary information. We expect these activities to increase. This could include the use of artificial intelligence, the **Internet of Things**, and analytics. Unauthorized disclosure of, denial of access to, or other incidents involving sensitive or confidential patient, vendor, business associate or Sansum Clinic data could damage our reputation and our competitive positioning in the marketplace. This is true whether through systems failure, employee negligence, fraud, misappropriation, or cybersecurity,

ransomware or malware attacks, or other intentional or unintentional acts. Additionally, it could disrupt our operations or our patients' care, cause us to lose patients, and result in significant financial exposure and legal liability. Similarly, unauthorized access to our software and IT supply chain or software-as-a service providers could result in negative publicity, significant remediation costs, legal liability, damage to our reputation, and government sanctions. It could have a material adverse effect on our results of patient care operations.

There are numerous methods (i.e. our service providers' information systems access, our employees' access, or third party access) and bad actors propagating cyberattacks (i.e. computer programmers, hackers, members of organized crime and/or state-sponsored organizations) who continuously develop and deploy viruses, ransomware, malware, or other malicious software programs that could be adversely affected if we incur legal liability.

Cybersecurity threats are constantly expanding and evolving. They are becoming increasingly sophisticated and complex, increasing the difficulty of detecting and defending against them. This tremendously increases the effort in maintaining effective security measures and protocols. We are subject to numerous laws and regulations designed to protect this information, such as the **Health Insurance Portability and Accountability Act ('HIPAA')** and the **California Consumer Privacy Act ("CCPA" and its successor the California Privacy Rights Act ("CPRA")** that will go into effect on January 1, 2023), as well as various other U.S. federal (**CISA, FBI, HHS, etc.**) and state laws governing the protection of privacy, health, or other personally identifiable information and data privacy and cybersecurity laws. These laws and regulations continue to evolve, are increasing in complexity and number, and increasingly conflict among the various levels, which has resulted in greater compliance risk and cost for us.

Monetary damages might not be subject to a contractual limit of liability or an exclusion of consequential or indirect damages and could be significant. We carry liability insurance and cybersecurity insurance to cover us against claims related to security incidents, cyberattacks, and other related incidents. We have diligently

held ourselves to a higher standard than HIPAA by adopting **NIST CSF (National Institute of Standards and Technology – Cyber Security Framework)**. We have a third party attest to our maturity and conformance with NIST CSF annually. We take the identification, protection, detection, response, and recovery of Sansum Clinic environments very seriously, as if we were the patient.

Sansum Clinic focuses on information security as a strategic investment. We have improved several basis points on a 5 point scale since executing on the larger NIST CSF program a few years ago. Just in this last year, we have automated many things and implemented technologies that enhance our security posture greatly. For instance, we implemented a Threat Intelligence Monitor and Blocker system to enhance our capabilities of ingesting multiple intelligence feeds from industry specific and broad based trusted sources to take immediate action. In a short amount of time, we have **blocked over 43 million connections** with this system. We have also enhanced our third-party risk management program to further eliminate supply chain concerns and stay ahead of vendor vulnerabilities like **log4j**. We have

employed the assistance of a system to elevate our internal security awareness through active behavior campaigns such as phishing. Additionally, we have invested in the education of our users by utilizing a broader portfolio of videos and gamification within that same system for education customized for each user. This accompanies existing periodic Information Security-focused newsletters. As a part of our risk management program within Information Security, we continue to update strategies around multifactor authentication and access. This includes the extension to cloud based services we have recently implemented to mature enterprise resource management and human capital management. We are not alone in our endeavor by utilizing a **Managed Security Service Provider** in constant monitoring of the environment, processes, and connections in addition to incident response from a distinct **Incident Response Plan**. This Incident Response Plan is coordinated with our **Business Continuity Plan** and **Disaster Recovery Plan** respectively.



*Marc Johnson
Chief Information
Security Officer*



IT Teams Provide Essential Connectivity

Wave is the name of the team and the technology that powers Sansum Clinic’s electronic health record. The Wave team is supported largely by the Clinic’s data warehouse and analytics team, called Sonar. The Wave and Sonar teams work hand in hand to support all physicians and staff, which ultimately leads to superior support and care for our patients.

“The past two years have been incredibly challenging for everyone in healthcare, including Information Technology. It’s been incredible to watch the relationships across the Clinic strengthen even though we have never been further apart physically. In IT, what matters to us most is making sure that the technologies are available to help our providers take care of patients. The pandemic has only further clarified that priority for us.”



Sean Johnson, MHA, BSN, RN
Chief Information Officer



IN 2021 ALONE, THE WAVE AND SONAR TEAMS HAVE:

- Successfully Implemented **1 Brand New Credentialing System**
- Completed **2 Wave System Upgrades**
- Sonar Team Developed and Certified **18 Quality Measures for Regulatory Reporting**
- Resolved **8,428 Wave and Sonar Helpdesk Tickets**
- Answered **25,280 patient and 7,050 staff/provider calls**
- Supported **80,081 Telehealth Visits**

THE SONAR POPULATION HEALTH TEAM

- Increased Annual Wellness Visits by **70% (to 8,272) this year**
- And increased a **146% (to 2,668) Improvement** in Post Discharge Visits





The Sansum Clinic Cardiology Department cared for 8,504 patients at 15,712 appointments in 2021.



PATIENT EXPERIENCE

- 2021 Organizational Performance
- Your Voice Matters Employment Engagement Survey
- WELL™ Health Texting Increases Vaccine Clinic Efficiency
- New MyChart Features for Enhanced Patient Self-Service
- Pediatric Symptom Checker Provides Parents with Peace of Mind
- Surgical Service Lines Grow to Meet the Needs of Our Community
- Palliative Care and Advance Care Planning Program

2021 Organizational Performance

In 2021, a year when COVID-19 precautions and community-health initiatives were still very much a focus for our administrative and clinical teams, we continued to prioritize five key pillars: **Patient Experience, Access, People, Financial Health, and Quality**. Measuring and monitoring performance in each of these areas allows us to align teams across the organization.

PATIENT EXPERIENCE – measured based on feedback received from patients via the **Press Ganey patient experience survey** – is prioritized in all aspects of our operations. Over the past few years, we have aimed to achieve improvement on-par with the top 30% of practices measured by this survey. Striving for continuous improvement amidst a pandemic is challenging at best, and while we didn't meet our target for the year, 2021 was the highest-performing year since implementing the patient experience survey in 2017. In 2021, we achieved a standard overall mean score of 93.20, placing us in the 78th percentile for the state of California. We commend our patient-focused teams for achieving notable improvement in areas where we have typically been challenged, including **Access**.



OUR PEOPLE – the highly-trained providers and staff – continued to remain engaged in their daily work and the broader mission of providing an excellent healthcare experience. Our annual engagement survey of employees showed a slight decrease in performance over calendar year 2020, but improvement compared to 2019. Staff's resiliency score – reflective of their ability to recover and bounce back from adversity – improved compared to calendar year 2019 and 2020, surprisingly given the amount of continual burden placed by COVID-19, but reflective of their dedication and tireless work in continuing to lead our community through times like never before.

OUR FINANCIAL HEALTH continued to be an area of focus, with sustained strain on volumes and staffing due to the pandemic, which ultimately impact revenue to the organization. We continue to manage our financial performance diligently in order to ensure financial resources to support near and long-term needs of the organization and our community.

With regard to **QUALITY BENCHMARKING**, 2021 performance held fairly steady compared to 2020, again, another extraordinary achievement given the volume of preventive care that has been delayed throughout the pandemic. Our population health teams remain focused on proactively addressing the medical needs of our patient populations, even during times when receiving preventive care may be difficult or requires the use of new technology, including Telehealth visits.

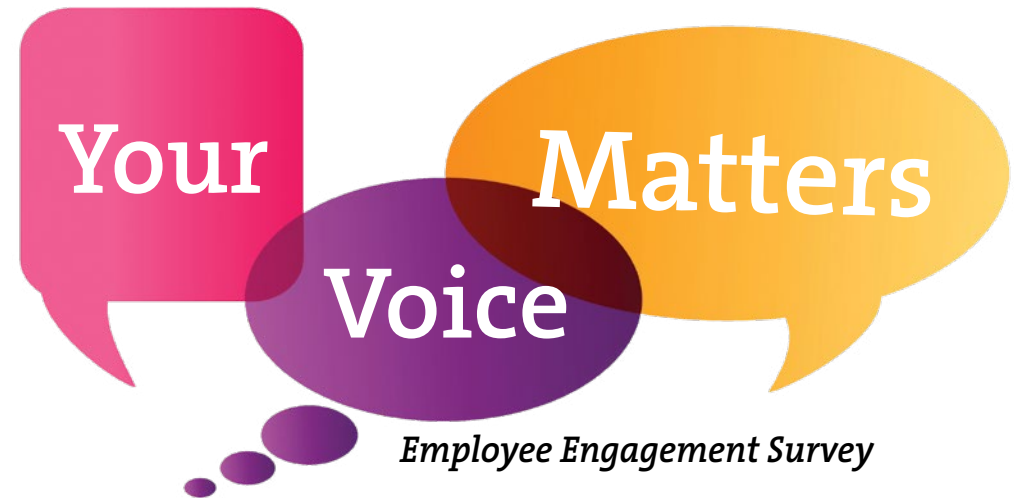
With over two years of pandemic response in the rear-view mirror, COVID-19 is still very much a daily focus for Sansum Clinic's teams. While we are hopeful to soon shift away from active pandemic response and into a new normal, it has become more important than ever to ensure we're focusing finite resources on our strategic initiatives and on efforts that best serve our mission, vision and values.



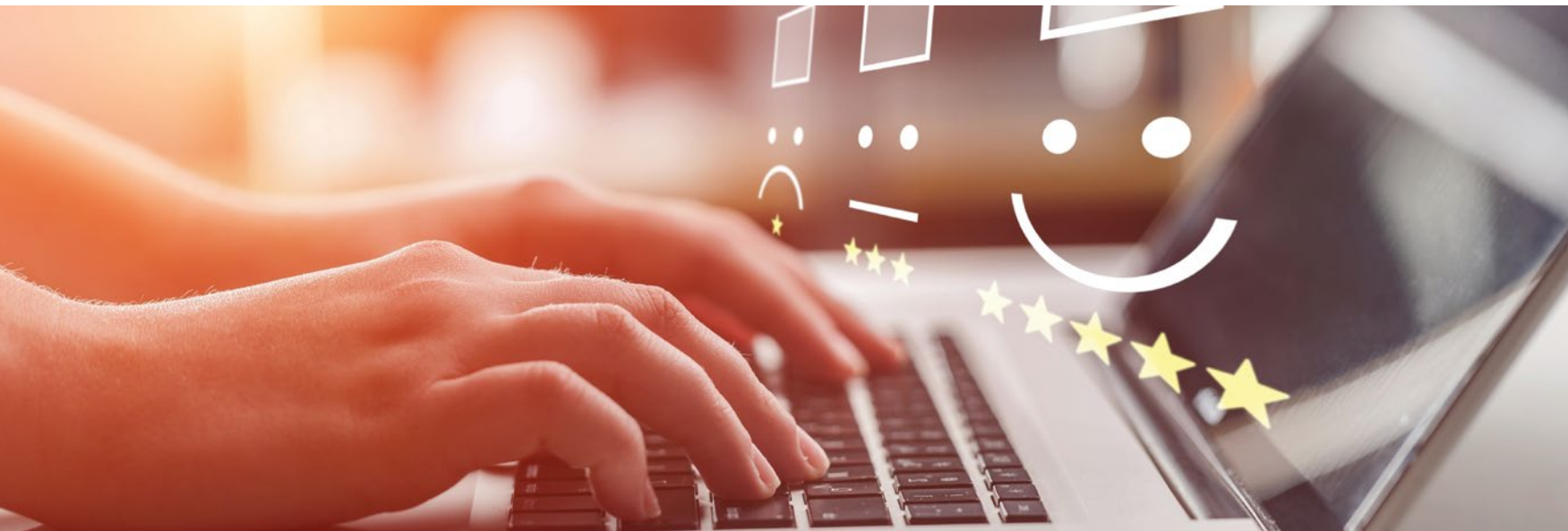
Lindsay Cortina
VP, Strategic Initiatives

Your Voice Matters Employee Engagement Survey

In November of 2021, the Clinic conducted its annual “**Your Voice Matters**” employee engagement survey. The Clinic saw an all-time high response rate of **76%** or **938 employees**. In 2021, our overall engagement indicator came in at **3.99 on a five point scale**. Statistically this is +0.02 vs. the National Healthcare Average. We consider this a strong score after a very challenging year for our staff. Emergent key drivers of engagement in 2021 revolved around the Clinic treating employees with respect, caring about quality improvement and conducting our business in an ethical manner. We continued to see opportunity in our staff compensation and benefits levels and the resiliency of our teams. These opportunities stem from intense compensation pressure due to the “*great resignation*” and low staffing levels driven by factors relating to the ongoing pandemic. As a result of the positive gains we are seeing in our overall employee engagement scores, the Clinic has shifted the focus of a portion of our **Human Resources team** to specifically focus on



employee experience to continue to study the key drivers of engagement and focus our efforts toward doing everything we can to make the Clinic the best place to work in Santa Barbara. We see this as a key to delivering excellent service to our patients. Since 2019, we have seen significant improvement in our individual team index scores with a **20% improvement** in the number of teams whose engagement scores indicate they have few obstacles to engagement. The Clinic will use this valuable survey information to drive our employee retention and engagement strategies going forward.

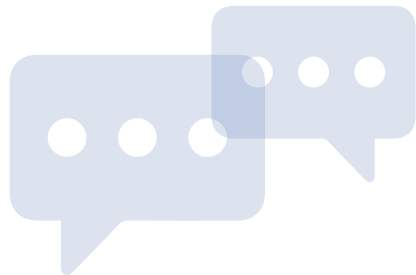


*Dan Weigel, SPHR, SHRM–SCP
VP, Human Resources*

WELL™ Health Texting Increases Vaccine Clinic Efficiency

In 2021, Sansum Clinic partnered with Santa Barbara-based WELL to pilot 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. Using ChatAssist, Sansum Clinic was able to roll out **13 different types of fully-automated patient communications, successfully completing 95% of these conversations.**

ChatAssist has been especially helpful in navigating the COVID vaccine process. *“Early on, we had tremendous challenges when we were facing an inconsistent supply of vaccines, often learning last-minute whether we were getting a shipment, so we did not have much time to contact patients to schedule appointments,”* said **Lindsay Cortina**, Vice President of Strategic Initiatives. *“We had to manually call people, starting with the older patient population, only to discover many had already been vaccinated elsewhere.”* Only one in every six phone calls would result in a patient scheduling a vaccination. It was clear there had to be a more efficient way to reach thousands of people without having to make numerous phone calls each time we received the vaccine on short notice. Within 24 hours of contacting WELL with this problem, the Clinic was able to deploy WELL's new text message and phone call campaigns. In a ten-day period, this ChatAssist workflow sent out **26,600 messages**, saving the staff **159 hours of work**. Within 6 months of deployment, 13 different use cases resulted in **35,000 fully automated patient conversations.**



WELL
at **sansum** CLINIC



New MyChart Features for Enhanced Patient Self-Service

Recognizing that many patients want self-service options to manage their healthcare, Sansum Clinic introduced new and expanded services that patients can use by logging into MyChart, when and how they choose, using a computer or mobile phone.

THE NEWEST FEATURES INCLUDE:

- **Primary Care Direct Scheduling.** Patients who have seen their Sansum Clinic primary care provider in the past 18 months can use MyChart to schedule their next non-urgent visit, up to 7 months out.
- **COVID-19 Vaccination Scheduling.** Adult patients can now directly schedule an appointment for their COVID-19 vaccine in MyChart.
- **Flu Shot Scheduling.** Adult patients can now directly schedule an appointment for their annual flu shot in MyChart.
- **Screening Mammogram Scheduling.** Patients age 40-80 who have seen their primary care provider in the recent past can schedule a mammogram appointment using MyChart.
- **Patient Self Sign-In.** Patients with MyChart can let Clinic staff know they are “present” for an appointment in the MyChart app or on the MyChart website on their smart phone.
- **Office Visit Estimates.** Patients can now generate estimates for common office visits in MyChart.
- **Financial Assistance Requests.** Patients can now use MyChart to submit an application and the required financial information in order to apply for financial assistance.



Pediatric Symptom Checker Provides Parents with Peace of Mind

Sansum Clinic's Pediatrics & Adolescent Medicine Department introduced a **new online Symptom Checker**, a self-assessment tool that can help parents decide when to call the doctor if their child is not feeling well or has a minor injury. The tool is not a substitute for professional medical advice, diagnosis or treatment, but is a resource vetted by our physicians that can provide trusted information on symptoms or behavior.

When minor symptoms or behavior-related questions come up, often during the evenings and weekends, parents, caregivers and family members can use this Symptom Checker to find steps to take to relieve some symptoms at home, and to determine if your doctor should be called to seek care. The Symptom Checker tool also provides dosage tables for common medications (Tylenol, Motrin, Benadryl, Zyrtec and Claritin), first aid instructions, and pediatrician-recommended advice for situations such as family issues, discipline, sleep problems and more.

The Symptom Checker can be found in both English and Spanish at pediatrics.sansumclinic.org. Parents can select the age and gender of the child, and use keywords or select a body area to find the related care guides for the symptoms.

To access the Symptom Checker, visit pediatrics.sansumclinic.org.



Surgical Service Lines Grow to Meet the Needs of Our Community

Despite the enhanced infection controls and safety protocols implemented as a result of the COVID-19 pandemic, volume at the **Foothill Surgery Center at Sansum Clinic (FSC)** has **increased 198% in the last 4 years** – from **2,250 cases in 2017 to 6,714 cases in 2021**. The **Gastroenterology Ambulatory Service Center (GI ASC)** completed a scheduled caseload of **9,679 cases in 2021** – an **increase of 14%** over last year's 8,500 cases.



"I wish I could impart to you what it takes to be a staff member of a busy surgery center," said Sandra Berreth, Surgical Service Line Director. "The staff of FSC and GI ASC are amazing. Renee Takis, Adelina Gonzales and Morgan Allison are the mainstays. My gratitude for this highly-skilled and rapidly-paced staff is overwhelming. And I have to mention the skilled leadership of Dr. Douglas Etsell as the Foothill Surgery Center medical director and Dr. Vincent DeRosa as chair of the Gastroenterology Department. Without their multifaceted skills, the ASCs would not be as successful."

To continue to accommodate the growing need for outpatient surgery, we are currently expanding the Foothill Surgery Center from 4 to 6 operating rooms. The FSC and GI ASC are both accredited by the **Accreditation Association for Ambulatory Health Care (AAAHC)**.



Foothill Surgery Center team members dress in blue in honor of Cynthia Alonzo, Surgery Scheduler, who is fighting colon cancer.

Palliative Care and Advance Care Planning Program

The **Palliative Care Program** provides supportive care for any adult patient with serious illness. We are a program of **Sansum Clinic**, located in the **Ridley-Tree Cancer Center**, and serve anyone in the Santa Barbara area (currently from Oxnard to Tulare). We address the physical, mental, social, and spiritual suffering that accompanies serious illness, with a team consisting of physician, nurse practitioner, nurses, social worker/counselor, medical assistant, and care coordinator. We explore the goals of care for our patients, and complete advanced directives and POLST forms. We communicate closely with the primary and specialty teams that refer these patients.



Advance Care Planning at **sansum** CLINIC

Since March 2020, the global pandemic, coupled with a community-wide lack of access to psychological care, has led to increased stress and isolation for patients and families, and increased separation from loved ones when hospitalized.

The Palliative Care Team continues to work closely with inpatient palliative care team and meet weekly with **Dr. Michael Kearney** to discuss Cottage Hospital patients, and **Community Palliative Care** patients to ensure smooth transitions between different care settings and to assist in training medical residents. The team also continues community outreach with faith and other thought leaders,



Palliative Care Team

medical and mental health professionals, to ensure patients have access to these services.

The Palliative Care Team conducted **1,851 visits** in 2021, with **499 unique patients** (2020 visit volume was **1,225 visits**, a **46% increase**). **Telemedicine** has remained **25-41% of visits** since the start of the pandemic in 2020.

PALLIATIVE CARE TEAM

Deborah Meyers, MD

Stefanie Rashti, CRNP

Catherine Morales, Manager

Mara Rodriguez, Care Coordinator

Carrie Hamilton, Medical Assistant

Lotem Chemaya, Social Worker

Mary Henderson, Registered Nurse

Rebecca Bank, Registered Nurse

Maria Fazio, Registered Nurse

Edith Rodriguez, Social Worker

The Palliative Care and Advance Care Planning Program is made possible with the 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.**

A PATIENT STORY

JP is a 69 year-old female with advanced localized anal cancer. She came to **Palliative Care** in February 2020 with pain, but we quickly uncovered that she was having significant anxiety and insomnia. As **Dr. Deborah Meyers** explored her history, it was apparent that she had had many losses that she had never grieved: her husband died quickly from a brain tumor, her stepson committed suicide after her husband's death, her mother died, her dog died, and she lost her home. Soon after we met, her father became very ill and died. She returned to her previous home in a small community in Colorado to help pack up her belongings and deal with her father's estate, but had a recurrence of her cancer.

She returned to Santa Barbara for treatment and has had gradual progression of her disease, with many hospitalizations for infections, blood clots, confusion, and pain management. Our social worker helped her with her grief and adjustment to disease progression. The spread of the disease has been slow and disfiguring. During a hospitalization for blood infection, her bladder failed to function, and during this time, her nephew committed suicide.

“Mary’s efforts (and the team at Palliative Care) made something challenging so easy. This is what I consider to be the best customer service we can possibly find, especially during these trying times.”

Over the last two years, the nurses, social worker, **Stefanie Rashti, CRNP** and **Dr. Meyers** have all worked closely with JP and her family, to support her during this difficult journey. Dr. Meyers has also seen her as an inpatient and **Dr. Michael Kearney** cares for her during hospitalizations, and via the community Palliative Care team with frequent debriefings between the teams.

PATIENT FEEDBACK

*“I would like to express our sincere appreciation to **Mary Henderson, RN, Dr. Meyers** and the **Palliative Care Team** for assisting us recently in obtaining a hospital bed for my elderly mother. After speaking with Mary on January 11, 2022 and discussing our situation, Mary quickly provided me with a reference. I contacted the Medicare equipment provider that same day. By the end of that same day, I emailed all the information the equipment provider needed from Dr. Meyers in order to process the request through Medicare. Mary provided the information to the provider the next day. Today, I received confirmation from the equipment provider that Medicare approved the request and the provider can deliver the bed as early as tomorrow. All of this was done within a week of me contacting the Palliative Care Team. Mary’s efforts (and the team at Palliative Care) made something challenging so easy. This is what I consider to be the best customer service we can possibly find, especially during these trying times.” – Grateful Patient*

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
- WE CARE Team Awards
- Ridley-Tree Cancer Center 2021 Year in Review



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 longstanding 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.

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. 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 was important with COVID-19 vaccinations.



SEE International is a non-profit organization helping to end preventable blindness in the United States and across the globe.



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 and/or vision insurance. Since the start of this partnership in 2019, Sansum Clinic's ophthalmology physicians and medical staff have provided eye care to nearly **100 patients (729 services)**. Ninety percent of all visual impairment can be prevented or cured; adequate vision care can make a remarkable impact on a person's well-being.

In 2014, SEE launched the annual **Humanitarian of the Year Award** to honor the outstanding dedication and achievement of volunteer ophthalmologists and partner organizations that are committed to ending preventable blindness. Sansum Clinic was honored to receive **SEE International's 2021 Humanitarian Award** for the category of **Community Partner**. This is a great honor and we're pleased to work alongside our partners at SEE International.



*Ophthalmology Department at
Sansum Clinic Elings Eye Center*



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. As a federally-qualified health center, SBNC is dedicated to providing high-quality, affordable, medical, dental, behavioral health, medication-assisted treatment and enabling services 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 52 years**. **Over 22,000 patients are cared for** at four medical clinics, two dental clinics, an integrated care clinic, a bridge clinic for

substance use disorders and health promotion services with **Wellness Navigators**.

Since 2010 Sansum Clinic has provided **6,920 SBNC patients** with **9,373 diagnostic services** for free, totaling over **\$3.5 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**.

“Our vision is one in which everyone has access to healthcare whenever they need it, and not just in the case of an emergency.”

– Dr. Charles Fenzi

Since reinstating the colonoscopy screening program in 2019, **Sansum Clinic**, in partnership with the **Cancer Foundation of Santa Barbara**, has screened **88 SBNC patients**.



The Architectural Board of Review approved the design for the new SBNC clinic at 621 West Micheltorena Street. The new quarters will allow SBNC to provide medical, mental health and dental services all in one building.



Charles Fenzi, MD
Chief Executive Officer & Chief Medical Officer
Santa Barbara Neighborhood Clinics



Doctors Without Walls – Santa Barbara Street Medicine



Doctors Without Walls – Santa Barbara Street Medicine (DWW) is making a meaningful impact on our local communities by delivering critical and sustainable **medical and mental health services to the most vulnerable** unsheltered and marginally sheltered individuals and families in Santa Barbara County. Our primary goal is to provide medical care to our community’s homeless population living on the street while still fighting the COVID-19 virus. DWW has **vaccinated large numbers of the population** it serves. We are encouraging and educating the unvaccinated clients we serve to become vaccinated.

DWW is partnered with multiple agencies to provide medical services through place-based clinics, evening street outreach and daytime outreach. DWW currently supports public health with **follow-up medical visits with vulnerable clients** living on the streets. DWW supports the Neighborhood Navigation Centers, which includes Behavioral Wellness and other agencies that serve the same population. More than ever DWW is needed on the streets of our community. As eviction moratoriums end and more people struggle to stay housed, DWW performs a much-needed service in providing immediate care for medical needs of the underserved and refers clients to the agencies they need to become housed and stay housed. Throughout the pandemic, DWW has played a vital role in leading efforts, alongside our local Governments, Non-Profits, Business Leaders and Educators to not only mitigate the spread of COVID-19 but to also deliver consistent reliable medical care to our community. DWW provides much needed insight into the population it has served for 14 Years.

DWW is able to fulfill their mission thanks to the partnership with Sansum Clinic. A number of Sansum physicians and staff members volunteer their time, which allows DWW 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 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:

- | | | |
|------------------------------|----------------------------------|----------------------------------|
| Dree Daugherty, MD | Lynn Matis, MFT (Retired) | Maria Tafoya |
| Lauren Estess | Ashley McGrogan, PA-C | John Vallee, MD (Retired) |
| Marie Claire Lamb, MD | David Phreaner, MD | Hailey Yates |
| Alex Leasure, MD | Laura Polito, MD | |
| Aaron Lewis | Berenice Ruvalcaba | |

“Working with DWW means returning to the foundations of medicine, trying to help people however we can. Not worrying about billing or documentation. Just offering whatever care you can to help those most in need. It means connecting with your community and using your profession to improve it.”



– Alex Leasure, MD, Urgent Care

“I have been privileged to serve as a volunteer physician for DWW for the last 5 years, following a career in Family Practice at Sansum Clinic. This has been a tremendously satisfying experience for me. We serve patients who often have no other access to medical care. Almost without exception, they are thankful and appreciative. My fellow volunteers are committed, patient, and compassionate in difficult



circumstances. I’m able to use my medical skills and judgment in the absence of complex technology. I have the opportunity to share my medical knowledge and insight with younger, enthusiastic folks.”

– John Vallee, MD

"I have really enjoyed being a volunteer for DWW - SBSM over the past couple years. It's been a pleasure to get to know and try to provide some comfort to SB's most



vulnerable patient population. I have hope for the future of health care when I interact with the amazing pre-health students that do a majority of the leg work for this organization."

– **Dave Phreaner, MD**, Goleta Family Practice

"I'm proud to be associated with DWW - SBSM and contribute in a small way to the great work they do. People experiencing homelessness frequently have daunting logistical or financial obstacles to receiving medical care in a traditional setting and that's where DWW - SBSM steps in, bringing the medical care to the patient at no



cost. I am so pleased to see the organization develop and expand its reach, which has only been made possible with the support of the community, philanthropic groups and businesses, and of course the caring, dedicated, and hard-working volunteers."

– **Aaron Lewis**, Application Analyst

"I enjoy working with DWW - SBSM volunteers, both professionals and students.



Each of us is profoundly affected by working with and gaining the trust of some of the most vulnerable folks in our community. The trust we build assures many will come to us in times of need; whether for a health situation or a vaccine clinic."

– **Lynn Matis, LMFT (retired)** Psychiatry



WE CARE Year in Review

At Sansum Clinic, our customer service and communications framework, WE CARE, guides how we interact with others to ensure the best possible care and service. The tenets of WE CARE 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 people 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 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
- **Consistent communication** through a weekly e-zine highlighting **WE CARE best practices** and **news** from around our clinic
- Production of **The Upside**, a quarterly video program showcasing good news happening at all of our sites
- **Ongoing feedback from our WE CARE Ambassadors**, 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

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.



WE CARE Team Awards

PATIENT ACCESS TEAM

Sansum Clinic's **Patient Access Department** received the first **WE CARE Team Award of 2021**. **Karen Handy, MPH**, Vice President of Operations, along with Medical Director **Marjorie Newman, MD** presented the award to Revenue Cycle Director **Betty Lee**, who received it alongside her managers at our Call Center. Patient Access has a team of more than 40 employees who became a frontline resource for patients during COVID-19.

PEDIATRICS & ADOLESCENT MEDICINE

Our **Hitchcock Pediatrics Department** received the second **WE CARE Team Award** of 2021, also presented by Karen Handy to **Randi Rossi**, Hitchcock Branch Manager and her hardworking team of more than 30 staff and providers, noting the extra reassurance and guidance they offered to families and children throughout the pandemic. From a drive-thru vaccination clinic to appointments in outdoor tents, the Pediatrics team created a safe and welcoming environment to care for our youngest patients.



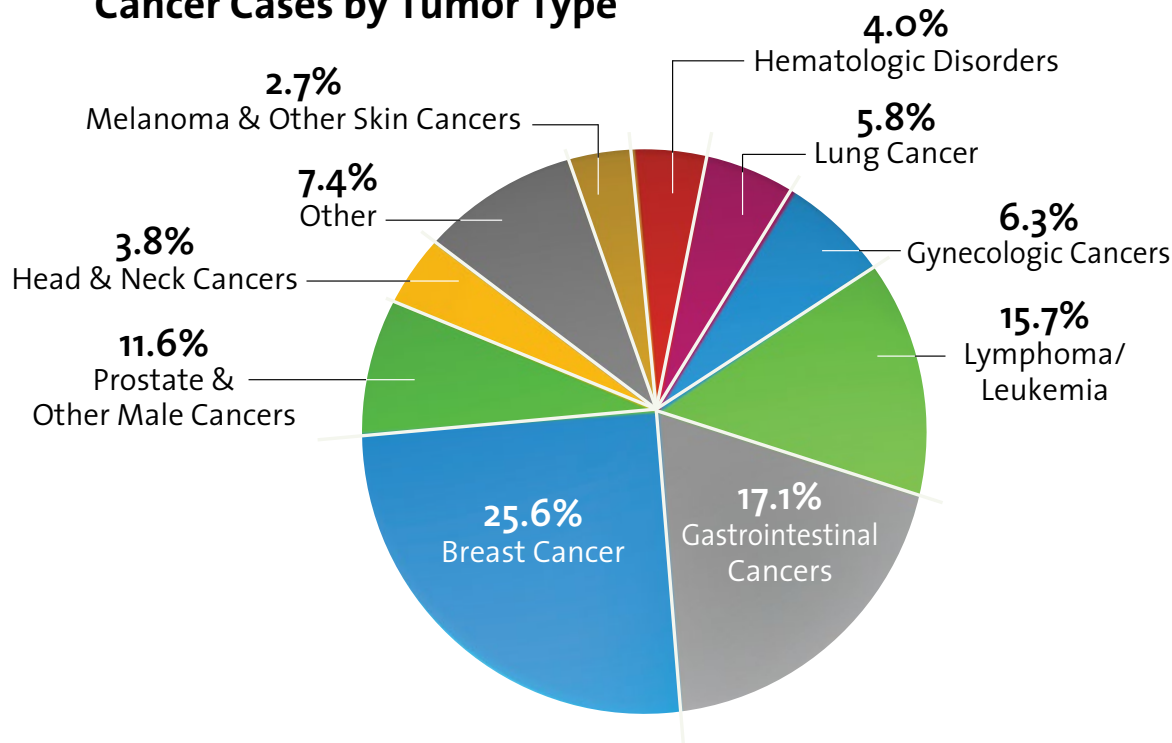
Ridley-Tree Cancer Center

2021 Year In Review

Ridley-Tree Cancer Center’s team of highly-trained and compassionate physicians and staff care for patients with the most advanced surgical, medical and radiation oncology treatments. Through the use of cutting-edge technology, global clinical trials, and research-based supportive care and wellness programs, we provide our patients with every opportunity for successful treatment and recovery.

Strength in Numbers

Cancer Cases by Tumor Type



Unique patients **12,477**

Total visits **66,256**

Average age **65**

Active clinical trials **59**





A Year of Growth



Our fight against cancer continued as we experienced significant growth in **patient volume**, including: **28% increase in surgical oncology**, **9% increase in radiation oncology**, **22% increase in nuclear medicine** and **50% increase in palliative care**.



The Medical Oncology Department welcomed **Maira Campos, MD**, **Jessica Davis, NP** and **Kristin DeHahn, NP-C**.



Radiation oncologist **Justin Voog, MD, PhD** began treating select prostate cancer patients with **stereotactic body radiation therapy (SBRT)**, an advanced treatment that delivers powerful doses of radiation to the precise location of the tumor. This high-dose, high-accuracy treatment reduces the duration of therapy from eight weeks to five days.



Healthcare executive **Matthew Baumann, MBA**, joined Ridley-Tree Cancer Center in November as Vice President of Oncology Services, and as a member of Sansum Clinic's executive team.



Radiation Oncology Department achieved a **second four-year accreditation** from the **American Society for Radiation Oncology (ASTRO)** as an Accredited Program for Excellence® (APEX), recognizing our commitment to delivering exceptionally safe, high-quality care.



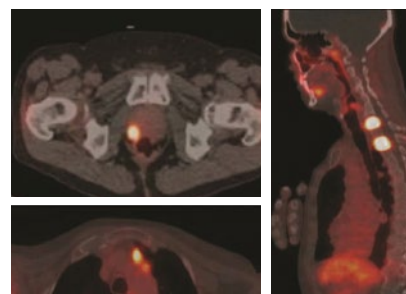
The **American College of Radiology** designated our Breast Imaging Program as a **Breast Imaging Center of Excellence (BICOE)**, signifying the highest level of imaging quality, safety and care. Accredited services include stereotactic breast biopsy, breast ultrasound and ultrasound-guided breast biopsy, breast MRI and mammography.



Advancing Research. Improving Lives.™



Expanded research affiliations to include **NRG Oncology Network** and **TEMPUS Time Trials Program**, adding Radiation Oncology and niche clinical studies to our already-strong Medical Oncology trial pipeline.



The FDA's approval of **PYLARIFY®** in May of 2021 cleared the way for the **Nuclear Medicine Department** to utilize the diagnostic tracer for more accurate and earlier detection of prostate cancer.

Spotlight

Cancer Foundation of Santa Barbara

Ridley-Tree Cancer Center at Sansum Clinic offers the only comprehensive cancer care in Santa Barbara County. This stellar community resource would not be possible without the tremendous generosity from our fundraising partner, the Cancer Foundation of Santa Barbara.

The array of advanced treatments and technology, global clinical trials and evidence-based supportive care programs place Ridley-Tree on par with major



academic institutions. For patients managing a cancer diagnosis, access to this level of world-class care is life-changing, becoming even more critical during the pandemic of 2021.

In 2021, the Foundation committed \$2,626,696 to Sansum Clinic in support of Ridley-Tree Cancer Center. This generosity and partnership allows us to deliver a level of cancer care that would otherwise be impossible in a community of our size.

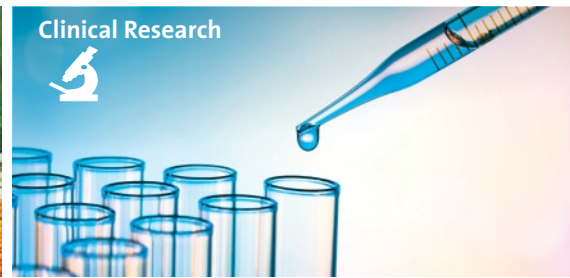
The following programs were made possible:



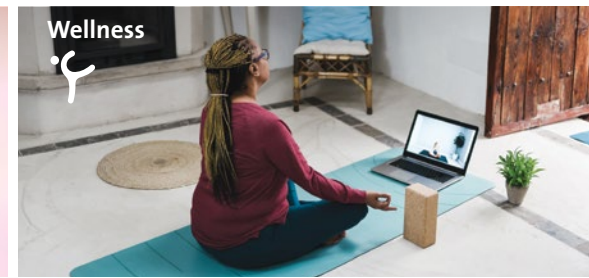
Community Health



Oncology Nutrition



Clinical Research



Wellness



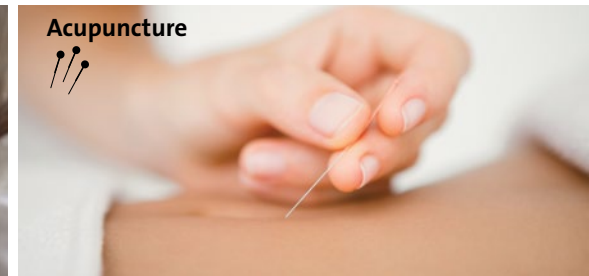
Education & Resource Library



Patient Assistance & Charity Care



Social Services



Acupuncture



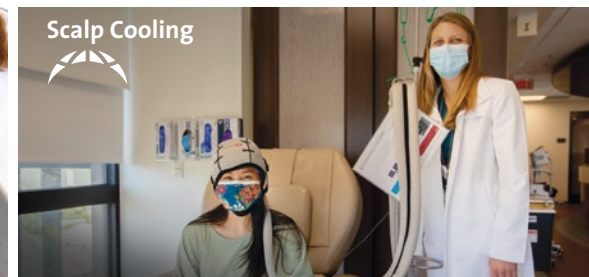
Genetic Counseling



Patient Navigation



Staff Education



Scalp Cooling

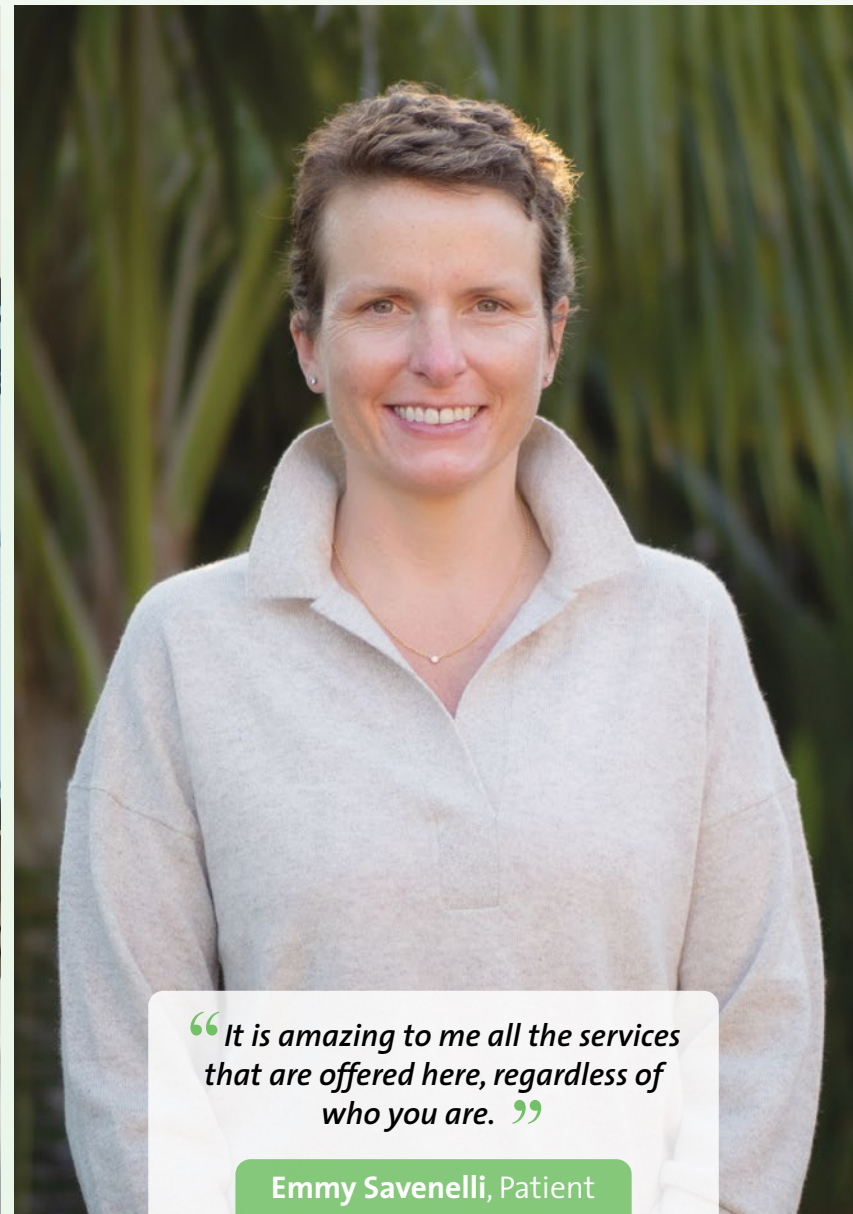
Words of Appreciation

We are deeply grateful for the Cancer Foundation's incredible vision, leadership and unwavering commitment to providing quality cancer care for the Central Coast. We look forward to many more years of continued partnership in the fight against cancer.



“The Cancer Foundation has been wonderful in its support of our mission. Without them, the state-of-the-art technology would be incredibly difficult to bring to our Santa Barbara community.”

W. Warren Suh, MD, MPH, FACR, Radiation Oncologist



“It is amazing to me all the services that are offered here, regardless of who you are.”

Emmy Savenelli, Patient

EDUCATION & OUTREACH

- 2021 Health Education Highlights
- Sansum Speaks
- The Elly Nadel Prescription Navigator Program
- Visiting Professor of Surgery Education Program



2021 Health Education Highlights

The purpose of **Health Education** is to improve the quality of life of patients and the community by encouraging healthy lifestyle choices, assisting in the management of ongoing health conditions and providing support and information for serious illnesses. We offer many programs and services to the community free-of-charge. Due to the ongoing COVID-19 pandemic, Health Education programs remained virtual in 2021.

HEALTH EDUCATION PROGRAMS

- Advance Directives Workshop
- Camp Wheez*
- Diabetes Conversations
- Gestational Diabetes
- Nutrition Navigator
- Prenatal Breastfeeding Program
- Weight Loss Surgery Orientation
- Weight Loss Surgery Support Group
- WomenHeart Support Group
- Writing as a Tool for Health

ADDITIONAL SERVICES

- Advance Care Planning
- Advance Directives Notary
- Diabetes Education
- Doctor's Weight Management Program
- Health Resource Center
- Healthy People Healthy Trails
- Medical Social Work
- Nutrition Services
- Oncology Wellness Programs
- Oncology Nutrition Services
- Prescription Navigator Services

*in-person program



2021 Highlights

ADVANCE CARE PLANNING (ACP)

We offer access to a variety of ACP resources. Volunteer-led **Advance Directives Workshops** provide an opportunity for patients and community members to learn about the MyCare document and have their questions answered. Free one-on-one ACP assistance and notary services are available to **Sansum Clinic** and **Ridley-Tree Cancer Center** patients.



HEALTH RESOURCE CENTER

Although closed to the public, the **Health Resource Center** continues to answer questions on health and about Sansum Clinic. In 2021, the Health Resource Center received approximately **1,300 inquires**. In addition, the Health Resource Center continues to provide vital administrative support to Health Education programs.

CAMP WHEEZ

Camp Wheez returned in 2021 with a modified in-person program to prioritize the health and safety of campers, staff and volunteers. We welcomed **25 campers** who participated in games, crafts, cooking and more, all while gaining the confidence and tools they need to manage their asthma.



FEATURED PROGRAM: WRITING AS A TOOL FOR HEALTH

In 2021, we introduced a new class called **Writing as a Tool for Health**. Everyone has a story of health, illness or a life event. Writing about your thoughts and experiences is a way to move through these times and can bring a sense of calm and wellbeing. In **Writing as a Tool for Health**, **Melissa Broughton** gives instruction and tips to make it easy to express your story in writing. Beginners are welcome! In just 2 hours, patients learn techniques to use writing as a healing tool. Melissa is a teacher, writer and lavender farmer. Her background in education and counseling and her love of words and storytelling come together in her therapeutic writing workshops. This 3-part class encourages participants to use writing as a way to document their thoughts and experiences to help them navigate through challenging times. Participants can attend one or all of the monthly sessions. Journal supplies are provided and the program is a virtual meeting you can do from the comfort of home, by computer or telephone. Free of charge and open to the community.

This program consistently receives an overwhelmingly positive response from participants:

“Having the guidance and structure for what to write about during this time was extremely valuable.”

“As someone who is currently fighting cancer..., it was freeing (and cathartic) to write about my experience and share with the other participants.”

“Each session I gain more insight into myself and enjoy the creative expression.”

“One of the best writing classes I have ever attended. I loved it. Hope to see many more.”





ADVANCE DIRECTIVE WORKSHOP



GESTATIONAL DIABETES



HEALTHY PEOPLE HEALTHY TRAILS



WEIGHT LOSS SURGERY ORIENTATION SEMINAR



WEIGHT LOSS SURGERY SUPPORT GROUP



UNDERSTANDING DEMENTIA



DIABETES CONVERSATIONS



CAMP WHEEZ



HEALTH RESOURCE CENTER



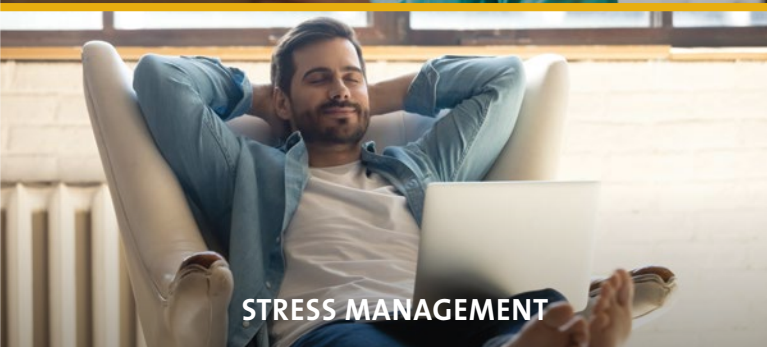
NEW TO MEDICARE



USING MYCHART



WRITING AS A TOOL FOR HEALTH



STRESS MANAGEMENT



WOMENHEART



PRENATAL BREASTFEEDING PROGRAM

Sansum Speaks – Women’s Council Speaker Series

In 2021, Sansum Clinic launched **Sansum Speaks**, a speaker series presented by the Women’s Council of Sansum Clinic, led by **Julie Nadel** and **Bobbie Rosenblatt**.

This series demonstrates Sansum Clinic’s commitment to providing not only the highest quality healthcare, but also informing and educating our community on important health topics. These talks are filled with valuable information presented by some of our most distinguished healthcare providers. We believe the more you know, the more you will get out of your healthcare experience at Sansum Clinic.

COVID-19 UPDATE:

We are committed to keeping our patients and community safe throughout the ongoing **COVID-19 pandemic**. To adhere to social distancing guidelines, we are offering pre-recorded talks that can be viewed online at any time on our website. New lectures are being recorded and released regularly. They have been so well received, we anticipate we will continue the online format, and build on it with additional in-person events.



Bobbie Rosenblatt and Julie Nadel



SANSUM SPEAKS
*A Speaker Series Presented by
 the Sansum Clinic Women’s Council*

COVID-19: LOOKING BACK, LOOKING AHEAD

By **Dr. David Fisk**
 Infectious Disease Specialist
 November 18, 2021



ADVANCEMENTS IN PAIN MANAGEMENT

By **Dr. Graham Reimer & Dr. Emanuel Zusmer**
 December 15, 2021



OCULOPLASTIC SURGERY: SPECIALIZED SURGERY ON THE STRUCTURES AROUND THE EYE

By **Dr. Mica Bergman**, Ophthalmologist, Oculoplastic Surgeon
 December 17, 2021





ASSISTING PATIENTS IN MANAGING MEDICATIONS AND PRESCRIPTIONS

The **Elly Nadel Prescription Navigator Program** assists patients in managing medications and prescriptions.

Sansum Clinic is leading the way in Santa Barbara County with this Prescription Navigator program. This is a pharmacist-led medication therapy management program that ensures the safe, effective, and appropriate use of medications by Sansum Clinic patients. The Clinic joins the prestigious list of healthcare systems that have seen the benefit and have developed medication therapy management programs, such as Cedars-Sinai, Kaiser, Johns Hopkins and USC.

Our Prescription Navigator is well trained in the therapeutic uses and effects of drugs and can help ensure appropriate medication use, reduce medication-related problems, enhance patient education and compliance with medication regimens and ultimately improve health outcomes.

Physicians refer patients to the Prescription Navigator for one-on-one office visits or telephone consultations, and patients can also self-refer to the program through the **Brown Bag Medication Review Program**. Last year there were **1,324 total patient outreach encounters**.



FAMILIES AND CAREGIVERS

The **Prescription Navigator** often works with caregivers of family members to give them a better understanding of medications they might help administer, and to guide them with setting up pill boxes for proper adherence to medication therapy.

EXPERT CARE

Rania Shenoda, PharmD, Prescription Navigator joined Sansum Clinic as our first Prescription Navigator in 2014. She earned her undergraduate degree in Psychobiology from the University of California, Los Angeles and her Doctor of Pharmacy degree from the University of Southern California. To make an appointment with the **Prescription Navigator** please call **(805) 898-3075**.

The **Elly Nadel Prescription Navigator Program** is generously underwritten by **Julie Nadel**.



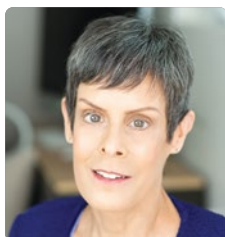
Rania Shenoda, PharmD, Prescription Navigator



Visiting Professor OF SURGERY

COVID-19 prevented us from hosting an in-person **Visiting Professor** for 2021 but thanks to high tech we were able to line up four guest visiting professors who presented via zoom on March 17 and 18.

Sansum Clinic's **Visiting Professor of Surgery Education Program** was established in December 2010 to advance educational opportunities for local surgeons and surgical residents in training at **Santa Barbara Cottage Hospital**. The Program Administrator is **William Charles Conway, II, MD, FACS**.



DEANNA J. ATTAI, MD, FACS

Associate Clinical Professor, Department of Surgery
David Geffen School of Medicine at UCLA

Presentation: *Full Circle: Lessons From an Unconventional Academic Career*



WEN T. SHEN, MD, MA

Professor of Clinical Surgery
Program Director, Endocrine Surgery Fellowship
University of California, San Francisco

Presentation: *Operating on Shadows: How to Manage the Adrenal Incidentaloma*



JENNIFER SUZANNE DAVIDS, MD

Department of Surgery
Division of Colon and Rectal Surgery
University of Massachusetts Memorial Medical Center,
Worcester, MA

Presentation: *Surgical Evaluation and Management of Constipation*

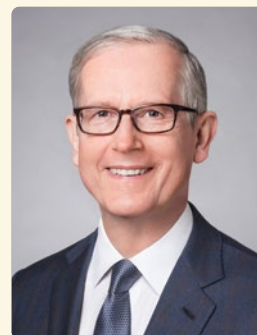
ALFREDO M. CARBONELL, II, DO, FACS, FACOS



Vice Chairman of Academic Affairs
Program Director, Minimally Invasive Surgery Fellowship
Co-director Hernia Center
Department of Surgery, Prisma Health-Upstate
Professor of Surgery, USC School of Medicine Greenville, Greenville, SC

Presentation: *Controversies in Incisional Hernia*

2023 Visiting Professor of Surgery



FABRIZIO MICHELASSI, M.D., F.A.C.S.

Lewis Atterbury Stimson Professor & Chairman,
Department of Surgery
Weill Cornell Medicine and Surgeon-in-Chief, New York-
Presbyterian/Weill Cornell Medical Center



Title Sponsor





Kathie Isbell, M.D.
OB/GYN

Abby McPherson, P.A.
Obstetrics & Gynecology

J. Velazquez, M.D.
OB/GYN

Veronica Pardo, P.A.-C.
OB/GYN

Kathie French, P.A.
Obstetrics & Gynecology

Karen Yahn, M.D.
Obstetrics & Gynecology

The Sansum Clinic Obstetrics and Gynecology Department cared for 11,626 patients at 26,103 appointments, including delivering 852 babies in 2021

AWARDS & RECOGNITION

McNamara Fund for Professional Enrichment and Education,
and the Nursing Scholarship Program

Esteban Alfaro awarded Dr. Erno S. Daniel Legacy Award

Sansum Clinic Physicians Swept the Best Doctors Categories

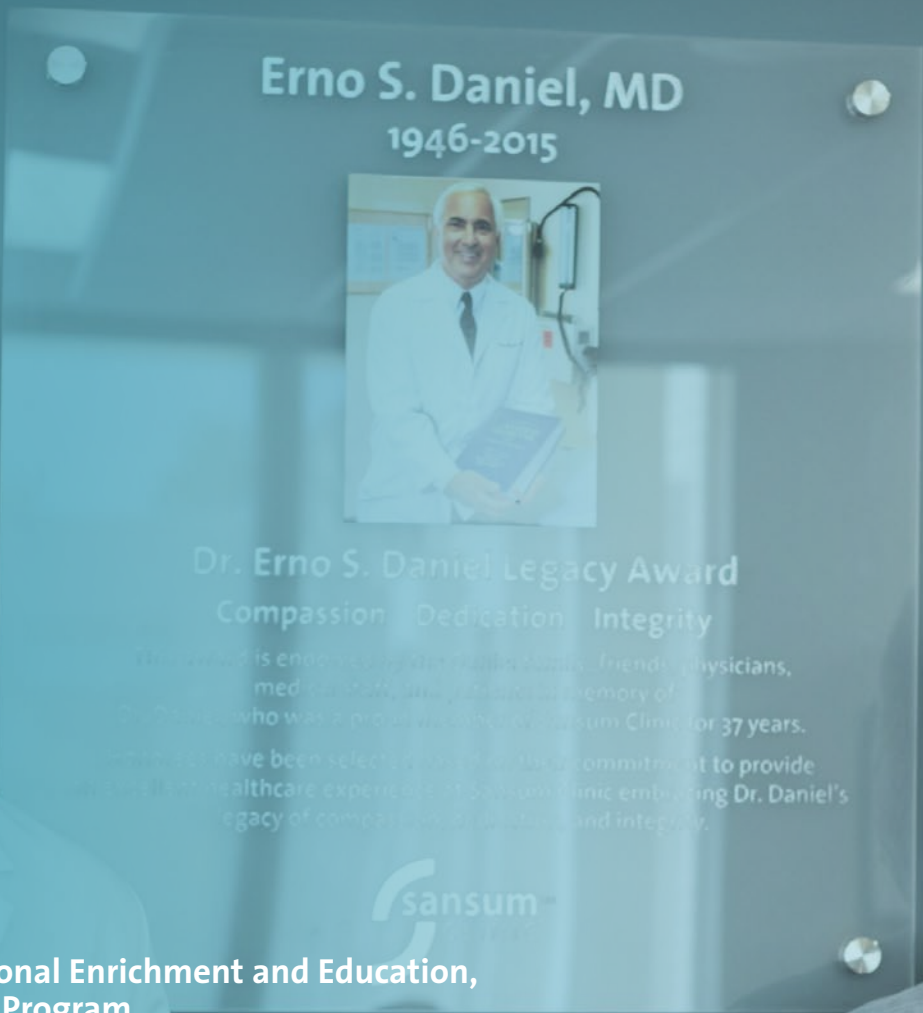
The Santa Ynez Valley News

The Pacific Coast Business Times

Dr. Toni Meyers, Award-Winning Pianist, Performs with
Santa Barbara Symphony

KISMET

Employee Appreciation Week



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. The following recipients were awarded

MCNAMARA FUND RECIPIENTS



Antonio Sanchez Director of Operations
Administrative Patient Care Services
Pueblo Multi-Specialty Clinic



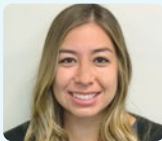
Cynthia (Cindy) Mathes Registered Nurse
Quality Coordinator
Foothill Ambulatory Surgery Center



Estella Wu, PharmD, MS, BCPS Manager
Oncology Pharmacist
Oncology Pharmacy Ridley-Tree Cancer Center



Ignacio Meza Manager
EHR Revenue Cycle Applications



Jodi Armstrong Clinical Resource, RN
Specialist Urgent Care
Pesetas Multi-Specialty Clinic

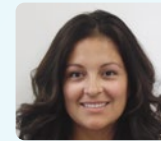


Jose Diaz, Jr. Application Analyst
EHR Revenue

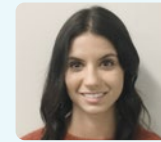


Luz Contreras
Financial Counselor
Patient Business Services

NURSING SCHOLARSHIP RECIPIENTS



Christina Rodriguez Registered Nurse Specialist
Oncology Infusion Center
Ridley-Tree Cancer Center



Elizabeth (Liz) Boccelli Registered Nurse
Manager Administrative Patient Care Services
Pesetas Multi-Specialty Clinic



Kara Lappico-Matejic Registered Nurse Specialist
Neurology
Pueblo Multi-Specialty Clinic

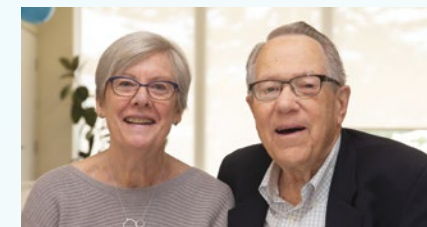


Kimba Madsen Registered Nurse Specialist
Oncology Infusion Center
Ridley-Tree Cancer Center



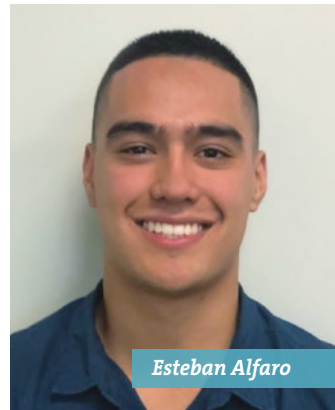
Suzanne (Michelle) Munoz Registered Nurse Specialist
Oncology Infusion Center
Ridley-Tree Cancer Center

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 2021 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.



Esteban Alfaro Awarded Dr. Erno S. Daniel Legacy Award

Esteban Alfaro was awarded the **Dr. Erno S. Daniel Legacy Award** by **Dr. Bryce Holderness**, Chair, Pesetas Internal Medicine Department (both pictured below). Esteban has been working in **Pesetas Internal Medicine** since October 2018. 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. **Martha Daniel** and the **Daniel Family** established this award with gifts given to the Clinic in memory of Dr. Daniel. This award is given annually to an employee in the **Internal Medicine Department** at Pesetas who exemplifies compassion, dedication, and integrity.



Esteban Alfaro



Dr. Bryce Holderness with Esteban Alfaro

Sansum Clinic Physicians Swept the Best Doctors Categories



IN THE SANTA BARBARA INDEPENDENT'S ANNUAL "BEST OF" EDITION

Best General Practitioner – **Dr. David Phreaner**

Runner up – **Dr. Liana Gonzalez**



Best Pediatrician – **Dr. Saida Hamdani**

Runner up – **Dr. Jerold Black**



Santa Ynez Valley News

DR. KEVIN BECKMAN WAS VOTED BEST DOCTOR, AND SANSUM CLINIC BEST FAMILY PRACTICE.



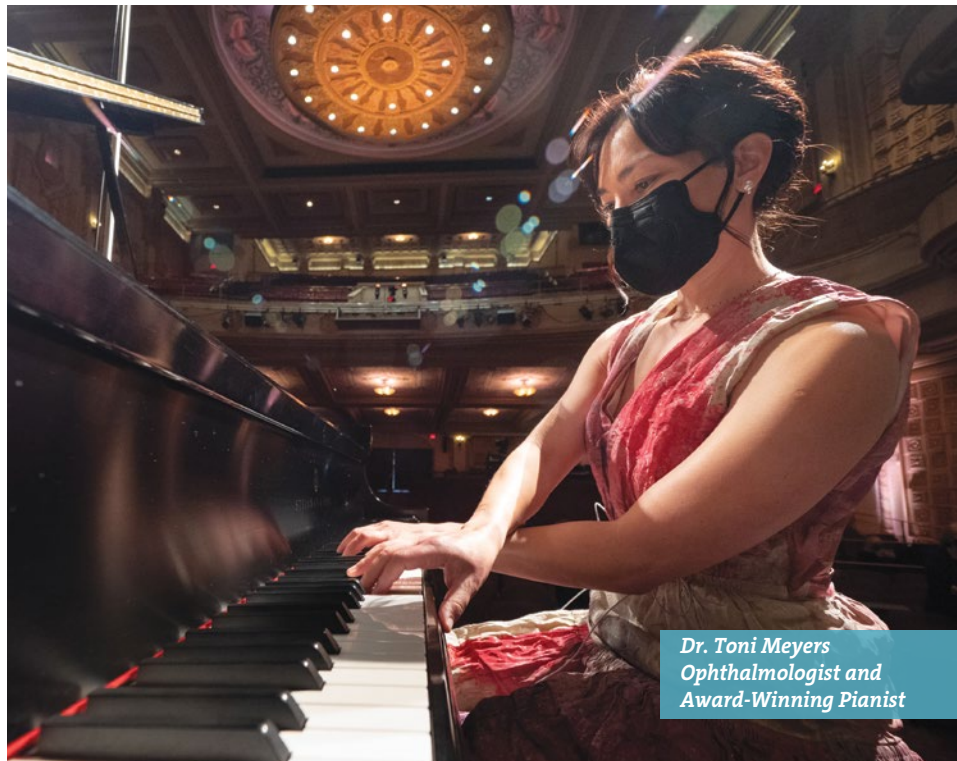
Pacific Coast Business Times

RECOGNIZED **KURT N. RANSOHOFF, MD, FACP**, CEO AND CHIEF MEDICAL OFFICER AMONG THE MOST INFLUENTIAL PEOPLE IN THE TRI-COUNTIES.



Dr. Toni Meyers, Award-Winning Pianist, Performs with Santa Barbara Symphony

The **Santa Barbara Symphony** returned on Saturday, February 27 with a special presentation to honor the medical community. Local physician-musicians joined the Symphony socially-distanced on stage, including award-winning pianist and Sansum Clinic ophthalmologist **Dr. Toni Meyers** (sister of acclaimed violinist **Anne Akiko Meyers**). Before the show, Symphony Board Chair **Janet Garufis** hosted a talk with Sansum Clinic CEO & Chief Medical Officer **Dr. Kurt Ransohoff** and **Ron Werft**, President & CEO of **Cottage Health**, about the connections between music and healing. **Maestro Nir Kabaretti**, Music and Artistic Director, led Symphony musicians and guest soloists in the concert program, which included Mozart, Beethoven, movements from **Bramwell Tovey's** Santa Barbara Sonata for Brass Quintet, and Russian physician and composer **Alexander Borodin's** Nocturno.



*Dr. Toni Meyers
Ophthalmologist and
Award-Winning Pianist*

Kismet: The Night of a Lifetime

Sansum Clinic healthcare heroes were invited to share in the 80th birthday celebration of **Sara Miller McCune** as she presented **Kismet: The Night of a Lifetime**, featuring **State Street Ballet** and **The Santa Barbara Symphony**, at the **Granada Theater**.



*Dru Hartley, with Arnie
and Diane Schaffer*



*Kathryn Martin
and Devin Scott*

Employee Appreciation Week

Sansum Clinic celebrated **Employee Appreciation Week** December 6-10 at all 23 sites, with a variety of events and small gifts to recognize the commitment of our nearly **1,500 valued staff members**.

TEAM sansum CLINIC



Corporate Office Team Party



Goleta Family Practice Enjoys Acai Bowls



Pueblo Multi-Specialty Clinic Party



Ridley-Tree Solvang Office Gift Packages



Marie Hubbell, MA, Pesetas Rheumatology Dept won a raffle gift basket



Hot Dog Party at Pesetas Multi-Specialty Clinic

NEW SANSUM CLINIC PHYSICIANS & PROVIDERS



KRISTIN DEHAHN, NP-C began a new role in January as a certified nurse practitioner at Ridley-Tree Cancer Center's Medical Oncology and Hematology Department, after working for five years as an infusion nurse. Kristin graduated from the University of Southern California's (USC) Family Nurse Practitioner Program. She also received her master's degree in nursing from USC, and her bachelor's degree in nursing from Rush University. She previously worked as a nurse at The Methodist Hospital in Texas.



MICHELLE STEWART, FNP-BC joined Sansum Clinic's Internal Medicine Department in February. She's board certified by the American Nurses Credentialing Center and received her degree from West Virginia University.



JUSTIN VOOG, MD, PHD, board-certified radiation oncologist, joined Ridley-Tree Cancer Center's Radiation Oncology Department in January. Prior to joining Ridley-Tree Cancer Center, Dr. Voog held academic positions at Memorial Sloan Kettering Cancer Center and the Massachusetts Institute of Technology. He earned his medical degree from the University of California San Diego. Dr. Voog completed his internship at Scripps Mercy Hospital in San Diego, followed by a residency at Harvard's Radiation Oncology Program.



ARI AVGERIS, MD, board certified in family medicine, joined the Goleta Family Practice location in May. Dr. Avgeris earned his medical degree from George's University in Grenada. He completed his family medicine residency at the University of Wisconsin, and his Hospital Medicine fellowship at Grant Medical Center in Columbus, Ohio. He held positions as a professor and Director of Medical Student Education at Virginia Tech. Prior to joining Sansum Clinic, Dr. Avgeris worked at Lompoc Valley Medical Center and Cottage Hospital.



OLIVIA BAJOR, DO, board certified in osteopathic medicine, joined the Goleta Family Practice location in September of 2021. Dr. Bajor earned her medical degree from Western University of Health Sciences in Pomona, California. She completed her family practice internship and residency at Arrowhead Regional Medical Center. She returns to her hometown from Kaiser Permanente in the Coachella Valley.



MAÍRA CAMPOS, MD, board certified in medical oncology, joined Ridley-Tree Cancer Center in August of 2021. Dr. Campos attended medical school and completed her Masters in Public Health at Faculdade de Medicina do ABC (ABC Foundation of Medicine) in Sao Paulo, Brazil. She completed her internal medicine residency at Jackson Memorial Hospital at the University of Miami, and her Hematology/Medical Oncology fellowship at the David Geffen School of Medicine at UCLA. She joins Ridley-Tree from St. Charles Cancer Center in Bend, Oregon.





JESSICA DAVIS, NP, joined Ridley-Tree Cancer Center's Medical Oncology Department in June of 2021. She earned her nursing degree from Columbia University, received her masters degree in nursing from UCLA, and completed her doctorate at the University of Colorado. She is a certified adult oncology nurse practitioner and an advanced-certified hospice and palliative care nurse practitioner. Prior to Ridley-Tree, Ms. Davis worked for a decade at the Rocky Mountain Cancer Center in Boulder, Colorado.



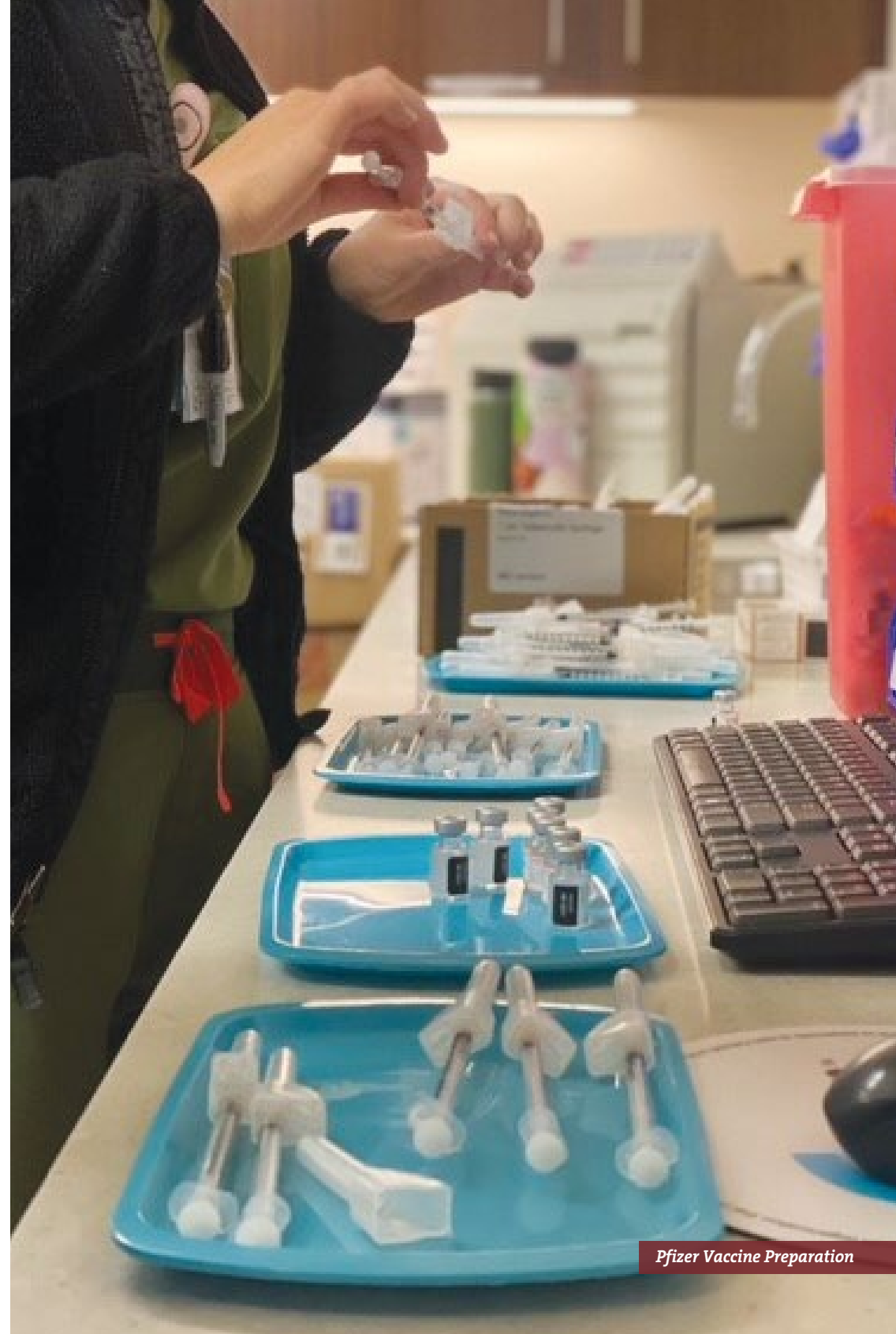
THAIDRA GAUFIN, MD, board-certified in internal medicine and infectious diseases, joined the Infectious Disease Department in July of 2021. Dr. Gaufin earned her medical degree from Georgetown University School of Medicine in Washington DC.

She completed her internal medicine residency, and her internship at Olive View-UCLA Medical Center, and her infectious disease fellowship at the University of California, San Diego.



BENJAMIN HASSAN, MD, board certified internist, joined the Internal Medicine Department in August of 2021. Dr. Hassan earned his medical degree from the University of Miami School of Medicine, and completed his internship and residency at Jackson

Memorial Hospital. He's held previous positions with the Miami VA Healthcare system, the David Geffen School of Medicine at UCLA, the Greater Los Angeles VA, and the St. Charles Healthcare System in Bend, Oregon, where he relocated from with his wife, **Dr. Maíra Campos**.



Pfizer Vaccine Preparation

SANSUM CLINIC BY THE NUMBERS



Total Insurance Counts

Plan Type	Total Patient Visits
Government	3,621
HMO	120,654
Indemnity	5,591
Medi-Cal	45,535
Medicare	183,313
Medicare Advantage	20,110
Other	7,102
PPO	211,585
Sansum Clinic Charity Care	815
Worker's Compensation	2,263
Grand Total	600,589

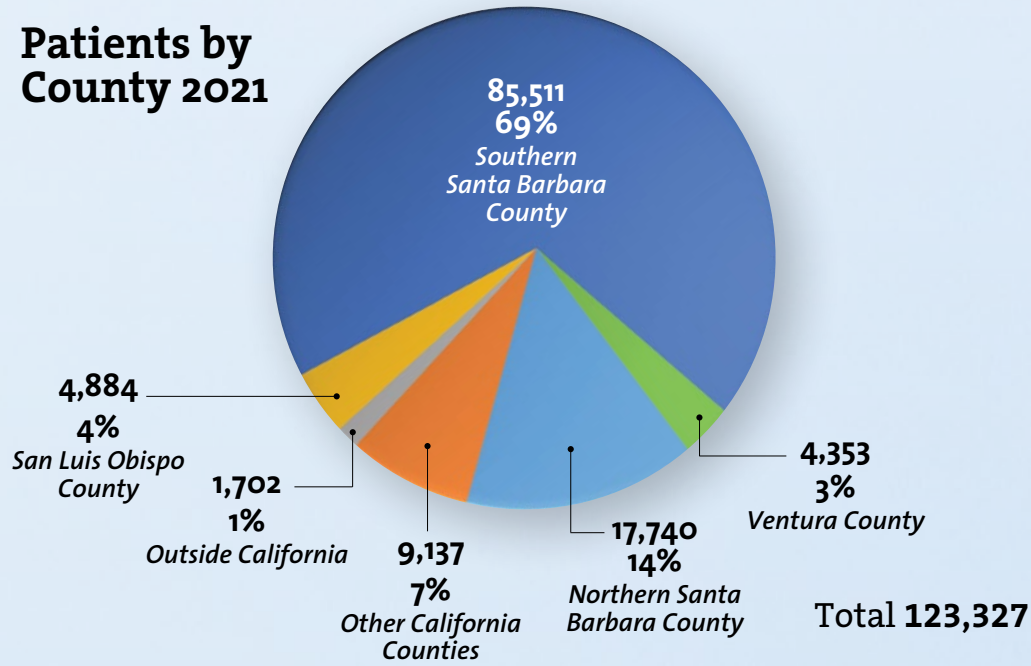
Total Patient Visits
600,589 Visits

Distinct Patient Count
123,327 Patients

Total Visits by Department

Specialty	Total Visits	Distinct Patients
Allergy & Immunology	5,383	3,725
Anticoagulation Clinic	1,440	294
Cardiology	15,712	8,504
Dermatology	31,502	18,500
Endocrinology	18,355	10,020
Facial Plastic Surgery	1,554	921
Family Medicine & Internal Medicine	110,596	54,244
Foothill Surgery Center	7,337	4,796
Gastroenterology	15,241	11,566
General Surgery	4,629	2,670
Infectious Diseases	2,185	1,169
Medical Oncology	25,433	6,918
Nephrology	3,112	1,668
Neurology	12,706	7,449
Nuclear Medicine	5,843	4,483
Obstetrics & Gynecology	26,103	11,626
Ophthalmology	32,846	13,631
Optometry	8,996	6,959
Orthopedic Surgery	21,190	8,775
Otolaryngology	10,499	7,002
Pain Management	6,678	2,358
Palliative Care	1,411	435
Pediatrics & Adolescent Medicine	25,797	11,128
Podiatry	13,312	6,288
Psychiatry & Psychology	12,928	2,385
Pulmonology & Critical Care	9,139	4,607
Radiation Oncology	5,809	1,760
Radiology	87,211	45,946
Rheumatology	12,102	5,596
Skilled Nursing	1,164	494
Surgical Oncology	4,445	2,102
Urgent Care	41,537	28,641
Urology	17,867	8,771
Weight Management	527	76
Total Patient Visits	600,589	

Patients by County 2021



Advance Practice Providers, which include Nurse Practitioners and Physician Assistants, cared for **32,321** individuals at **57,649** appointments in 2021, providing an exceptional extra layer of care to our patients.

*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.



FINANCIAL STATEMENTS 2021

Balance Sheet

Assets	2021	2020	Liabilities and Net Assets	2021	2020
Current Assets			Current Liabilities		
Cash and short-term investments	\$39,845,790	\$32,219,116	Accounts payable and accrued expenses	\$44,392,964	\$43,179,705
Patient accounts receivable	\$32,880,838	\$30,143,442	Current portion of long-term debt	\$4,493,061	\$4,037,304
Other current assets	\$8,040,505	\$6,899,609	Total current liabilities	\$48,886,025	\$47,217,009
Total current assets	\$80,767,133	\$69,262,167	Long-Term Liabilities		
Property, plant and equipment, net of accumulated depreciation and amortization	\$62,576,926	\$65,178,898	Long-term debt	\$27,704,129	\$30,581,976
Other Assets			Other long-term liabilities	\$16,123,233	\$14,117,833
Other assets	\$20,726,852	\$19,332,767	Total long-term liabilities	\$43,827,362	\$44,699,809
Total Assets	\$164,070,911	\$153,773,832	Net Assets		
			Unrestricted	\$67,725,496	\$57,946,014
			Restricted	\$3,632,028	\$3,911,000
			Total Net Assets	\$71,357,524	\$61,857,014
				<u>\$164,070,911</u>	<u>\$153,773,832</u>



Sansum Clinic Marketing and Philanthropy Teams



Statement of Cash Flows

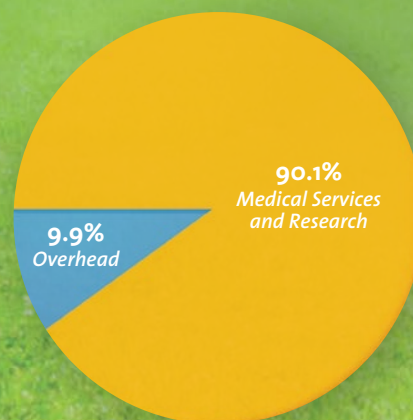
	2021	2020
Cash flows from operating activities		
Increase in net assets	\$9,500,510	\$(167,744)
Depreciation and amortization	\$8,179,857	\$8,395,146
Other changes in operating assets and liabilities	<u>\$(3,887,814)</u>	<u>\$2,055,735</u>
Net cash provided by operating activities	\$13,792,553	\$10,283,137
Cash flows from investing activities		
Net cash used in investing activities	<u>\$(5,302,426)</u>	<u>\$(6,952,646)</u>
Cash flows from financing activities		
Net cash provided/used in financing activities	<u>\$(2,152,255)</u>	<u>\$(2,490,951)</u>
Net change in cash and cash equivalents	\$6,337,872	\$839,540
Cash and cash equivalents, beginning of year	<u>\$23,214,136</u>	<u>\$22,374,596</u>
Cash and cash equivalents, end of year	<u><u>\$29,552,008</u></u>	<u><u>\$23,214,136</u></u>

Statement of Operations

	2021	2020
Revenues		
Net patient service revenue	\$275,197,685	\$250,946,071
Premium revenue	\$62,018,064	\$62,884,697
Other revenue	<u>\$29,685,173</u>	<u>\$25,193,836</u>
Total unrestricted revenues, gains and other support	<u>\$366,900,922</u>	<u>\$339,024,604</u>
Expenses		
Medical service contracts	\$106,172,289	\$92,457,769
Salaries and employee benefits	\$99,390,139	\$88,279,487
Medical and professional expense	\$116,869,960	\$123,107,159
Occupancy expense	\$13,234,448	\$12,671,043
Other expenses	<u>\$22,227,249</u>	<u>\$22,039,368</u>
Total expenses	\$357,894,085	\$338,554,826
Operating Income	<u><u>\$9,006,837</u></u>	<u><u>\$469,778</u></u>

Functional Expenses 2021

Sansum Clinic provides general healthcare services to residents within its geographic location. Expenses related to providing these services for 2021 are as follows:



Pandemic Relief Fund

Sansum Clinic is a nonprofit organization reliant on the generosity of the community we serve. At the start of the pandemic in 2020 many individuals and businesses asked how they could help. Their interest prompted 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**. Over the last two years we have received major gifts of support from **Dick Wolf, Jeff and Judy Henley, The Kemmerer Family Foundation, Mary Lynn and Warren Staley, Susie and Riley Bechtel, Dr. Nancy O'Reilly, Julie Nadel, Lady Leslie Ridley-Tree, Anne Akiko Meyers and Jason Subotky, La Centra-Summerlin Foundation, Manitou Fund and Guenter Ahlers**.

Throughout the pandemic continuous communication with our patients, alongside our ongoing email updates, generated many smaller gifts and we saw an increase in first-time gifts to the Clinic. This level of support reinforced to us that our patients believe in the work we do, and in the valuable role we played in providing healthcare to our community, every day, and even more so during a pandemic.



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 that 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 **123,327 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**.

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.

In 2021 there were **36 physicians in the loan program** who saw **33,173 unique patients** at **80,975 patient visits** in specialties that included **Cardiology, Dermatology, Gastroenterology, Hospitalists, Infectious Diseases, Internal Medicine, Neurology, Obstetrics and Gynecology, Oncology, Ophthalmology, Pain Management, Palliative Care, Psychiatry, Pulmonary/Critical Care, Rheumatology, Surgery, Surgical Oncology and Urology**. One of these physicians was selected by **Pacific Coast Business Times** in 2021 as **Healthcare Champion**.

Already in 2022 we have extended **loan offers to eight physicians**. Physicians have 18 months in which to use the loan and loans range from \$200,000 to \$300,000.

In our high priced real estate market our new physicians are experiencing some



challenges finding affordable homes. No sooner does a home go on the market than there are many offers and most offers are well over the asking price. Some are renting while they take the time to find the right home for their family. There are even challenges in the rental market.

This program remains one of our highest priorities as it enables us to continue to attract top caliber physicians from around the United States to provide the best medical care possible for our patients and the community...now and into the future.

We recently established a similar program for **Nurse Practitioners** and **Physician Assistants**, which will enable the Clinic to provide more team-based care for patients.

Facility Improvement Program

This program assists us in modernizing our facilities to enhance our patients' experience and support our ongoing efforts to attract the highest caliber physicians from around the United States.

We have some new projects underway that will help to position us for continued success in the future. We are expanding our **Foothill Surgery Center** from four operating rooms to six to meet the growing demand for outpatient surgery. We are creating a dedicated Breast Imaging Center to enhance the experience of the tens of thousands of patients who come to us for breast imaging each year. We are considering an expansion of our services in **Solvang** to ensure patients in the Santa Ynez Valley have better access to the high quality healthcare we provide.

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.

“As I was completing my fellowship training in Los Angeles, my wife, **Rania** and I began searching for a community in which to raise our children and advance my career.

While many jobs offered a nominal relocation package, Sansum Clinic's **Physician Housing Program** stood out as an attractive and enticing option for a young family. This program showcased Sansum's commitment to supporting physicians in their transition to becoming members of the Santa Barbara community. This program was unlike any other that I had learned about during my interview process and played a major role in our family's decision to relocate to Santa Barbara and join Sansum Clinic. The home loan program and the repayment process were seamless and gave us a sense of comfort with our decision to use the program.

While relocating to any new community involves challenges, the ease of this program allowed my wife and me to focus on our career paths. As a Structural Interventional Cardiologist, I have been afforded the opportunity to assist in bringing emerging transcatheter valve technology to the Santa Barbara community. Rania, a clinical pharmacist, was able to establish the community's first and only prescription navigator program. Sansum Clinic's **Elly Nadel Prescription Navigator Program** is generously underwritten by **Julie Nadel**, and is free of charge and open to all patients of **Sansum Clinic** and the **Ridley-Tree Cancer Center**.

The **Lovelace Fund for Medical Excellence** and the **Physician Housing Program** have enabled many similar physician stories of successful integration within our community, both professionally and socially. The Physician Housing Program is an example of Sansum Clinic's dedication to pushing the envelope of innovative recruitment of talented and highly trained physicians to the Santa Barbara community.”

Michael Shenoda
MD, FACC, FSCAI

Cardiologist

Sansum Clinic physician
since 2011



Mike and Rania Shenoda with Mya (14), Noah (9), Leah (12) and their trusty dog, Oreo.

Philanthropy Accomplishments

Since the start of the global pandemic in early 2020, Sansum Clinic has played a leadership role in the strategic community effort to screen, test and vaccinate as many people as possible.

Many individuals and businesses stepped up to help and with their support we established the Pandemic Relief Fund. Over \$2.6 million was raised, which 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 cost of flu shot and vaccination clinics.

The coordination, cooperation and personal sacrifices of our physicians and staff 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. Through all of this, our focus remains on our patients and the community.

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 level of support we received over the last two years reinforced to us 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.

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 THAT HAS ENABLED US TO:

- **Begin planning for a dedicated Breast Imaging Center** at our clinic at 215 Pesetas Lane.
- **Relocate and expand our Urology Department** at Foothill to make way for the **expansion of our Surgery Center**, which will enable us to go from four to six operating rooms to meet the growing demand for outpatient surgery.

- **Upgrade the telephone system** throughout all our facilities to enhance customer service and communication with our patients.
- **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**.
- **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**, expand hours to 8am to 7pm every day, and initiate same-day appointments to better meet patients' needs.
- **Expand our Primary Care capacity** at our Clinic at 215 Pesetas Lane, and increase our medical staff to include more than 70 primary care physicians.
- **Recruit 41 physicians** over the last decade through shared-appreciation home loans as part of the **Physician Housing Program** supported by **Sansum Clinic's Lovelace Fund for Medical Excellence**, resulting in a medical staff of more than **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.
- **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 Elly Nadel 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 one international and 11 national experts to our community 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 free week-long daycamp 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.

Philanthropy at a Glance

Capital	\$ 11,157
Endowment Programs	\$ 25,955
Lovlace Fund for Medical Excellence	\$ 2,064,345
Programs and Operations	\$ 1,654,233
Where the Need is Greatest	\$ 499,987
Ridley-Tree Cancer Center	
Support from Cancer Foundation of Santa Barbara	\$ 2,626,696
Public support for Ridley-Tree Cancer Center directed to Sansum Clinic	\$ 122,374
Transfers from Sansum Clinic to Cancer Foundation of Santa Barbara	\$ (122,374)
Total Philanthropic Support	\$ 6,882,373

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 and services 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.



THANK YOU TO OUR DONORS

Sansum Clinic gratefully acknowledges the generous support of our donors \$1,000+ from January 1 to December 31, 2021. Our donors serve an incredibly important role in helping us provide the high quality healthcare our community needs and deserves. Our ability to utilize the most advanced technology and deliver the most compassionate care is why Sansum Clinic is the first choice of **123,327 patients** and why the community has been coming to us for their healthcare for **100 years**. Working together we can continue to better serve you, our patients and the community.

\$1,000,000+

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Thank you for your ongoing support of Sansum Clinic.

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**.

PHYSICIAN & STAFF SUPPORT

Sansum Clinic wishes to acknowledge the generous philanthropic support of our physicians. The names in **bold** represent shareholders of Sansum Santa Barbara Medical Clinic, Inc. who have contributed to the **Lovelace Fund for Medical Excellence** and the **Physician Housing Program**. Names designated with * have made a gift to Sansum Clinic. Those with + have made a gift to the Cancer Foundation of Santa Barbara.

Sansum Clinic wishes to acknowledge the generous philanthropic support of our physician groups:

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Sansum Clinic Legacy Society

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

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

Sansum Clinic’s Legacy Society honors the loyal individuals who have included Sansum Clinic in their estate plans. Our members are dedicated to helping Sansum Clinic bring together the best physicians, the latest technologies and the most comprehensive healthcare to meet the specialized needs of our community.

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

If you wish to leave a gift or would like information about the Legacy Society, please contact **Dru A. Hartley**, Director of Philanthropy, at **(805) 681-7726** or dhartley@sansumclinic.org.

MARILYN GILBERT – LEGACY SOCIETY MEMBER

Marilyn Gilbert assembled a Sansum Clinic medical team to treat the health conditions she manages. *“Each one of the doctors I interface with has such concern for me,”* describes Marilyn. *“They follow the needs of their patients, and it’s like I am part of the team, and we are all working together.”* Her promise to the Legacy Society, so others can receive the same excellent care she has, was an easy decision. *“This Clinic has kept me alive and feeling good, and kept me full of life.”*



Marilyn Gilbert

We would like to acknowledge and thank the members of the Sansum Clinic Legacy Society.

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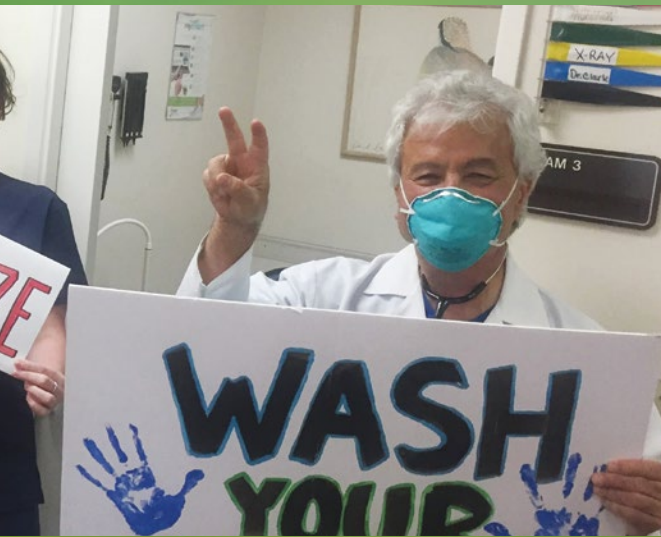
J. Thomas Fly*
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* Not pictured



Celebrating Our Healthcare Heroes





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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