

2013 - 2014

*Health Professions
Education Foundation*

Annual Report



HEALTH PROFESSIONS
EDUCATION FOUNDATION
Giving Golden Opportunities



Gary Gitnick, MD
President
Board of Trustees

On behalf of the Board of Trustees, it is my privilege to present the Health Professions Education Foundation's (HPEF) 2013-2014 Annual Report. This report highlights the positive impact HPEF has on California's medically underserved communities. By providing scholarships and loan repayments to students and health professionals in various fields, HPEF continues to contribute to California's changing healthcare landscape by awarding its scholarships and loan repayments to culturally and linguistically responsive healthcare professionals who can meet the needs of California's diverse communities.

Throughout HPEF's 27-year history, this foundation has grown from only a few to the thirteen programs currently administered. From July 1, 2013 to June 30, 2014, HPEF received 4,194 applications from healthcare students and graduates requesting \$63,224,982 in financial assistance. Of the qualified applications received, we awarded \$31,657,581 to 2,068 students and health professionals. Our award recipients commit to working in medically underserved areas of this state, and it is their work that continues to inspire me as a physician and as the chairman of the board.

The board of trustees and I look forward to working with you to support the mission of the Health Professions Education Foundation. We welcome collaborative partnerships, both public and private, that not only facilitate healthcare access but that also help bring awareness to our wonderful programs. I invite you to visit the Health Professions Education Foundation's website at www.healthprofessions.ca.gov and participate in "Giving Golden Opportunities!"



Robert P. David
Director
Office of Statewide
Health Planning
and Development

The Health Professions Education Foundation is evolving and innovating to meet the challenge of improving California's diverse supply of culturally competent health professionals, particularly in areas of unmet need.

The foundation has established a robust network of high-tech and high-touch recruitment channels to encourage young people and mid-career adults to enter health careers.

Focused education and outreach efforts have yielded a generous response from supporters and stakeholders, expanding the range of scholarships and service loans for entry-level health vocations to doctoral level faculty placement.

The foundation's survey and data collection efforts have given California much improved insight and understanding of the make-up and distribution of the health professions workforce, as well as an enhanced ability to evaluate the impact of policies and programmatic interventions.

Addressing health care workforce needs through the coming years requires all of us — policy makers, community leaders, healthcare providers, insurers, educators, and professionals — to work together to sustain existing programs and develop new strategies that promote health career recruitment, education and retention.

The foundation's annual report reflects the progress that can be made through cooperative partnerships for a healthier California.

Mission Statement

The Health Professions Education Foundation (HPEF) improves access to health care in underserved areas of California by providing scholarships, loan repayments, and programs to health professional students and graduates who are dedicated to providing direct patient care in those areas. In return for this support, recipients agree to provide direct patient care in a medically underserved area (MUA) of California for a period of one to three years.



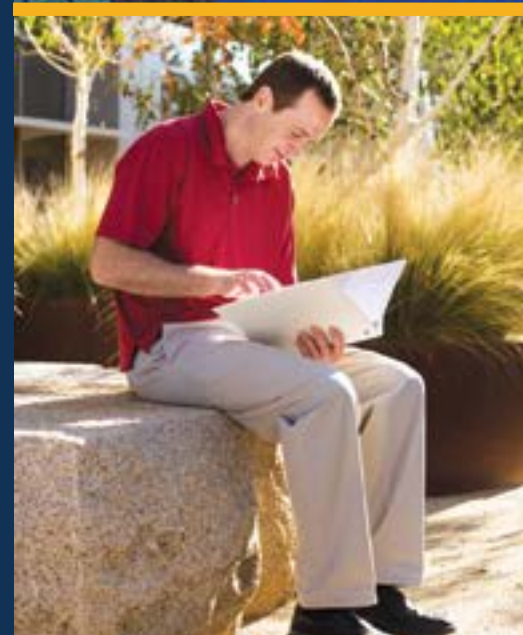
* Awardees featured in the 2013 - 2014 Annual Report are not fully representative of all of HPEF's 2013 - 2014 awardees.



2014 HPEF Awardees

Names of Awardees starting from the top left

- 1. Tracie Hall-Burks**
Mental Health Loan Assumption Program
- 2. Matthew Smith**
Bachelor of Science Nursing Loan Repayment Program
- 3. Znetta Askew**
Associate Degree Nursing Scholarship Program
- 4. Sandra Maline**
Mental Health Loan Assumption Program





Sandra Maline, LCSW
Mental Health Loan Assumption
Program Awardee

Improving Care Through HPEF's Awards

"I recently received an award from the Mental Health Loan Assumption Program (MHLAP) through the Health Professions Education Foundation for the 2013 - 2014 year. Receiving this award, in part, will allow me to obtain continuing education hours required by my licensing board. More importantly, the loan forgiveness will free up funds I will use elsewhere to attend professional conferences and training to increase my understanding of specific diseases, like childhood cancer and add to my clinical skills. It is important to me to provide the best, evidence based interventions for the patients and families I work with in a variety of specialty clinics.

I am a sole practitioner; therefore the only way for me to gain new skills is attending workshops, trainings and conferences personally or through webinars. Additionally, I am interested in alternative therapies for my pediatric patients that help them manage treatment related anxiety, depression or other anticipatory psychosomatic symptoms. I can only obtain professional training in these alternative modalities by participating in specific courses. These classes can be costly, and they often require travel to training sites. Although the medical center supports the use of these interventions, continuing education and conference attendance, there is limited reimbursement participation. In sum, receiving this award will allow me to increase clinical skills and knowledge and will likely lead to better care for patients and their families."

Saving Lives Daily

"This opportunity, as an awardee, has allowed me to see the light at the end of the tunnel. As a 2004 Masters of Social Work graduate I have officially been paying student loans for 10 years. In the mental health field there is such a huge need, yet service providers are limited due to the amount of work and the low pay range. In other words, it's not a field you go into if you plan on being rich! This makes it difficult to justify the thousands of dollars spent in obtaining the education needed to do the work we so dearly love. Thank you for this opportunity to help lighten the financial load as I continue to remain dedicated to servicing the underserved populations, saving and changing lives daily. This award allows me to focus more on my own family without having to face financial stress."

Tracie Hall-Burks, LCSW
Mental Health Loan Assumption
Program Awardee





Znetta Askew
Associate Degree Nursing Scholarship
Program Awardee



Matthew Smith, RN, BSN
Bachelor of Science Nursing
Loan Repayment
Program Awardee

A Career Worthy of Sacrifice

"I am extremely grateful to the Health Professions Education Foundation for the amazing work it does to ensure quality, comprehensive care is delivered to the people in our communities that need it the most. I chose to work at the UC Davis Medical Center, despite opportunities to make more money elsewhere, because they pride themselves in being on the front lines of healthcare delivery to Sacramento's most needy populations.

I feel blessed and honored to have been awarded this loan repayment opportunity. Nursing was my second career, so I was challenged by starting college over again at 25. The climate in the greater Sacramento

region for being accepted into BSN nursing programs is extremely competitive and requires near perfect grades in pre-requisite classes. Knowing this, and wanting more than anything a career devoted to taking care of people and their families, I quit work and took out loans to support my family. I had to focus on getting the grades I needed to succeed in this career. We had a child while I was in nursing school, putting a little more strain on the family. This award will be a great comfort, supporting all the sacrifices we made as a family, so I could pursue a truly meaningful career dedicated to taking care of other people. Thank you and I am forever grateful." - **Matthew Smith.**

Summary Statistics

Fiscal Year **2013-2014**

Fiscal Year

2013 2014

Total Applications Awarded

2,068

Total Applications Received: 4,194

Total Amount (\$) Awarded

\$31,657,581

Ethnicity of Awardees

**Self-reported by each applicant*

African American/ Black/ African	186
Caucasian/ White/ European/ Middle Eastern	631
Central American	65
Filipino	60
Indian	31
Mexican	492
Other	60
Other Hispanic	96
South American	42
Vietnamese	57
Declined to State	34

*Ethnicity categories with at least 50 applicants are reported above. Ethnicity is self reported by each applicant. For the 2013 2014 Application Cycle, HPEF applicants self reported 104 unique ethnicity categories.

Total Scholarships Awarded

260

Total Loan Repayments Awarded

1,808

57 out of 58 California Counties Represented

HEALTH PROFESSIONS EDUCATION FOUNDATION

**CONSOLIDATING BALANCE SHEETS - SPECIAL REVENUE FUND
JUNE 30, 2014**

	Registered Nurse Education	Mental Health Practitioner Education	Vocational Nurse Education	Mental Health Services*	Total
ASSETS					
Cash and Cash Equivalents	\$ 4,114,916	\$ 851,767	\$ 769,956		\$ 5,736,639
Appropriated Funds Available				\$ 26,007,167	26,007,167
Due from Other State Funds	2,388	21,113	442		23,943
Accounts Receivable	<u>459,389</u>	<u>67,254</u>	<u>62,313</u>		<u>588,956</u>
Total Assets	<u>\$ 4,576,693</u>	<u>\$ 940,134</u>	<u>\$ 832,711</u>	<u>\$ 26,007,167</u>	<u>\$ 32,356,705</u>
LIABILITIES, DEFERRED INFLOWS OF RESOURCES, AND FUND BALANCE					
Liabilities:					
Accounts Payable	\$ 1,319,188	\$ 54,325	\$ 55,261	\$ 4,529,422	\$ 5,958,196
Reserve for Long-Term Receivables	167,749	4,914	57,728		230,391
Due to Other State Funds	<u>39,235</u>	<u>3,292</u>	<u>4,569</u>	<u>231,802</u>	<u>278,898</u>
Total Liabilities	<u>1,526,172</u>	<u>62,531</u>	<u>117,558</u>	<u>4,761,224</u>	<u>6,467,485</u>
Deferred Inflows of Resources:					
Advanced Fee Collections			<u>8,285</u>		<u>8,285</u>
Fund Balance, Restricted for Fund Purpose	<u>3,050,521</u>	<u>877,603</u>	<u>706,868</u>	<u>21,245,943</u>	<u>25,880,935</u>
Total Liabilities, Deferred Inflows of Resources and Fund Balance	<u>\$ 4,576,693</u>	<u>\$ 940,134</u>	<u>\$ 832,711</u>	<u>\$ 26,007,167</u>	<u>\$ 32,356,705</u>

* The Mental Health Services Fund is a shared governmental cost fund for which the Foundation is appropriated funds for expenditure and encumbrance only. The California Department of Mental Health controls and accounts for the full activities and assets of this fund.

The information contained here is summarized from the annual financial statement, prepared by Gilbert Associates, Inc. The complete statements can be accessed at www.healthprofessions.ca.gov.

*The California Department of Mental Health was dissolved. The California Department of Health Care Services controls and accounts for the full activities and assets of the Mental Health Services Fund.

HEALTH PROFESSIONS EDUCATION FOUNDATION

**CONSOLIDATING STATEMENTS OF REVENUES, EXPENDITURES, AND CHANGES
IN FUND BALANCES - SPECIAL REVENUE FUND
YEAR ENDED JUNE 30, 2014**

	Registered Nurse Education	Mental Health Practitioner Education	Vocational Nurse Education	Mental Health Services*	Total
REVENUES					
Surcharges for Professional Licensing					
Fees	\$ 1,999,870	\$ 370,915	\$ 212,600		\$ 2,583,385
Student Loan Repayments	66,003	1,656	13,946		81,605
Interest Income	<u>21,095</u>	<u>2,398</u>	<u>5,441</u>		<u>28,934</u>
Total Revenues	<u>2,086,968</u>	<u>374,969</u>	<u>231,987</u>		<u>2,693,924</u>
EXPENDITURES					
Student Financial Aid	2,081,393	182,364	121,476	\$ 12,131,774	14,517,007
Salaries and Benefits	214,059	71,913	57,302	314,637	657,911
Central Administrative Services	24,397	6,139	4,790	364,852	400,178
Departmental Services	152,311	46,073	14,411	165,787	378,582
Facilities Operations	38,843	4,081	7,621	57,002	107,547
Professional Services	11,162	17,620	1,634	27,643	58,059
Travel	13,231	173	1,457	7,888	22,749
Postage	1,507	209	431	146	2,293
Communications	635	171	171	1,115	2,092
Training	889			993	1,882
Other Operating	<u>18,692</u>	<u>(24,906)</u>	<u>4,720</u>	<u>2,620</u>	<u>1,126</u>
Total Expenditures	<u>2,557,119</u>	<u>303,837</u>	<u>214,013</u>	<u>13,074,457</u>	<u>16,149,426</u>
Excess (Deficiency) of Revenues over Expenditures	(470,151)	71,132	17,974	(13,074,457)	(13,455,502)
OTHER FINANCING SOURCES					
Operating Transfers In from the California Department of Mental Health				<u>20,434,577</u>	<u>20,434,577</u>
Excess (Deficiency) of Revenues and Other Financing Sources over Expenditures	(470,151)	71,132	17,974	7,360,120	6,979,075
Fund Balance, Beginning	<u>3,520,672</u>	<u>806,471</u>	<u>688,894</u>	<u>13,885,823</u>	<u>18,901,860</u>
Fund Balance, Ending	<u>\$ 3,050,521</u>	<u>\$ 877,603</u>	<u>\$ 706,868</u>	<u>\$ 21,245,943</u>	<u>\$ 25,880,935</u>

Breakdown of Funding 2013 - 2014 Award Cycle

	Source of Funding	Total Amount Awarded as of June 30, 2014	Total Individuals Awarded as of June 30, 2014	Programs Supported	
LICENSURE FEES	Registered Nurse Education Fund	\$2,953,274	283	<ul style="list-style-type: none"> • Associate Degree Nursing Scholarship Program • Bachelor of Science Nursing Scholarship & Loan Repayment Program 	Continuously Appropriated Program Funds
	Medically Underserved Account for Physicians	\$2,410,438	24	<ul style="list-style-type: none"> • Steven M. Thompson Physician Corps Loan Repayment Program 	
	Mental Health Practitioner Education Fund	\$388,943	25	<ul style="list-style-type: none"> • Licensed Mental Health Services Provider Education Program 	
	Vocational Nurse Education Fund	\$167,608	35	<ul style="list-style-type: none"> • Vocational Nurse Scholarship Program • Licensed Vocational Nurse to Associate Degree Nursing Scholarship Program • Licensed Vocational Nurse Loan Repayment Program 	
OTHER FUNDS	Assembly Committee on Rules <small>* Interagency Agreement (2013 - 2014)</small>	\$2,000,000	148	<ul style="list-style-type: none"> • Allied Healthcare Scholarship & Loan Repayment Program • Health Professions Education Scholarship & Loan Repayment Program • Licensed Mental Health Service Provider Education Program 	Total \$12,457,418
	Mental Health Services Fund <small>* Continuously Appropriated Program Funds</small>	\$10,457,418	1,299	<ul style="list-style-type: none"> • Mental Health Loan Assumption Program 	
GRANTS	The California Endowment <small>* Four Year Grant (2013 - 2017)</small>	\$13,155,045	229	<ul style="list-style-type: none"> • Allied Healthcare Scholarship & Loan Repayment Programs • Health Professions Education Scholarship & Loan Repayment Programs • Licensed Mental Health Services Provider Education Program • Steven M. Thompson Physician Corps Loan Repayment Program 	Limited Term Funding
	Kaiser Community Benefit Charitable Contributions Program <small>* Two Year Grant (2011 - 2013)</small>	\$76,455	18	<ul style="list-style-type: none"> • Allied Healthcare Scholarship & Loan Repayment Program 	
	The California Wellness Foundation <small>* Two Year Grant (2012 - 2014)</small>	\$48,400	7	<ul style="list-style-type: none"> • Allied Healthcare Scholarship & Loan Repayment Program • Health Professions Education Scholarship & Loan Repayment Program 	
					Grand Total: \$31,657,581 Total Awardees 2,068

Words from our Awardees

“This grant has helped relieve some of the monthly financial stress related to school loan repayment, and I am not forced to get a second job. This in turn benefits my patients because I have more time and energy to devote to them during their cancer journey. Working in oncology can be emotionally draining at times, but I absolutely love what I do. This is more than a job for me; it is a calling. I am very grateful for HPEF’s support.”

Jennifer Lallo, MSN, NP-C

Health Professions Education Program Loan Repayment Program

“The HPEF inspires and motivates health providers, including myself, to continue to persevere and advance our careers. Subsequently, we become more efficient instruments in reducing human suffering.”

Rizaldy R. Ferrer, PhD

Mental Health Loan Assumption Program

“I regularly appreciate how lucky I am to have found a place in the world of medicine that gives me such professional and personal satisfaction. It is an honor to be recognized alongside the other dedicated program recipients who all work to improve the health of our most vulnerable Californians.”

Kellene Eagen, MD

Steven M. Thompson Loan Repayment Program

“HPEF gave me the opportunity to achieve my goal and helped in a way that’s indescribable. I am now the first person in my family with a bachelor’s degree. I continue to work in the hospital that I myself was born in and in which I delivered my babies.”

Angela Enright, BSN

Bachelor of Science Nursing Scholarship Program

“I greatly appreciate the award, and it will indeed allow me to continue to work with the medically underserved, homeless population on Los Angeles’ Westside.”

Carrie Kowalski, MPAP, PA-C

Health Professions Education Program Loan Repayment

“I believe that every person has a right to a just and dignified life. As a physician, I aim to work with the medically underserved and socio economically disadvantaged patient population.”

Jennifer Elizondo, MD

Steven M. Thompson Loan Repayment Program

“It has been an honor to employ my specialized skills in geriatric care and my Spanish language abilities to provide culturally competent services to this underserved and often misunderstood population. I went back to school later in life, and the student loan debt I am burdened with could easily have been an obstacle to my ability to follow my passion and work with mentally ill older adults. I am thankful to Health Professions Education Foundation for its generous support.”

Denise Caramagno, MA, MFT

Mental Health Loan Assumption Program

Governance

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HPEF would like to sincerely thank everyone who helped create the 2013 - 2014 Annual Report

Kaiser Permanente, Public Affairs

Alex Souza Photography: www.asouzaphotography.com

Awardees who participated in the photoshoot