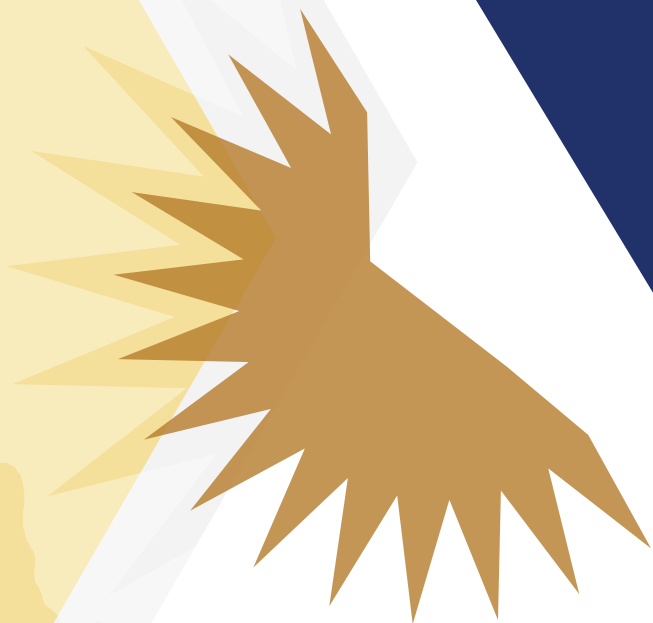


Health Professions  
Education Foundation

# 2015 2016 ANNUAL REPORT





#### OUR MISSION...

*The Health Professions Education Foundation seeks to improve access to healthcare for those who both lack and need it most. Since its establishment in 1987, HPEF has administered scholarship and loan repayments to health professional students and graduates who commit to providing healthcare services in underserved communities.*

## MESSAGE FROM THE BOARD PRESIDENT AND EXECUTIVE DIRECTOR



**Scott Sillers**  
*President*  
*Board of Trustees*

On behalf of the Board of Trustees, I'd like to present the Health Professions Education Foundation's (HPEF) 2015-2016 Annual Report.

While there is a political and philosophical debate about addressing the skyrocketing cost of healthcare, what we can all agree on is the need for more healthcare workers who will care for our fellow Californians. HPEF's charge has been, and will continue to be, encouraging people from underrepresented communities to become health professionals and increase access to health care in medically underserved areas. It is because of this that we will continue to work with partners, both old and new, to ensure that those Californians, who want to help their neighbors get healthier, are not hindered by increasingly burdensome financial costs from doing so—because in the end, a healthier California is a better California.



**Linda Onstad-Adkins**  
*Executive Director*  
*Health Professions Education Foundation*

By offering financial incentives to health professionals and students, HPEF addresses the challenge of improving access to quality health care in California. HPEF's loan repayment and scholarship awards assist in the hiring and retention of quality health professionals who meet the cultural and linguistic needs of California's medically underserved areas. In addition, HPEF assists with the financial hurdles health professionals and students face in trying to pursue a career in healthcare.

HPEF's success this year has greatly benefitted from partnerships with educational institutions, associations, organizations, government agencies, licensing boards and employers. I am proud to share HPEF's successes and invite you to review all that has been accomplished in the 2015-2016 FY.

## HISTORY

The Health Professions Education Foundation (HPEF) is a 501(c)(3) nonprofit housed within the Office of Statewide Health Planning and Development (OSHPD). It was statutorily created in 1987 to address the acute shortage of health professionals.

OSHPD administers strategic healthcare workforce programs to improve access to care by offering financial assistance to healthcare professionals and students. OSHPD also identifies areas of unmet need and encourages health professionals to provide healthcare in California's health professional shortage areas.

HPEF offers scholarship and loan repayment programs to support students and health professionals who are dedicated to providing healthcare in medically underserved areas.

As of the end of the 2015-16 FY, HPEF has awarded 12,882 applicants, totaling more than \$146.7 million to allied health, nursing, mental health, and medical students and professionals practicing in all 58 counties of California.

## PROGRAMS

### *Allied Healthcare Scholarship and Loan Repayment Programs*

The Allied Healthcare Scholarship Program (AHSP) and the Allied Healthcare Loan Repayment Program (AHLRP) are offered to allied healthcare students and graduates. Support for these programs is dependent on grant funding. Eligible applicants may receive scholarships and loan repayments of up to \$8,000 per year in exchange for a 12-month service obligation.

### *Vocational Nursing Scholarship and Loan Repayment Programs*

HPEF's vocational nursing (VN) programs include the Vocational Nurse Scholarship Program (VNSP), the Licensed Vocational Nurse Loan Repayment Program (LVNLRP), and the Licensed Vocational Nurse to Associate Degree Nursing Program (LVN to ADN). These programs are funded through a \$5 surcharge for the renewal of VN licenses in California. Eligible applicants for VNSP may receive a scholarship of up to \$4,000; LVNLRP awardees may receive a loan repayment of up to \$6,000, and LVN to ADN awardees may receive a scholarship of up to \$8,000. In return, recipients commit to a two-year service obligation of practicing direct patient care at a qualified facility in California.

### *Associate Degree and Bachelors of Science Nursing Scholarship and Loan Repayment Programs*

The Associate Degree Nursing Scholarship Program (ADNSP), the Bachelors of Science Nursing Scholarship Program (BSNSP), and the Bachelors of Science Nursing Loan Repayment Program (BSNLRP) are offered to students and graduates seeking careers as registered nurses. ADNSP awardees may be awarded up to \$10,000; BSNSP awardees, up to \$13,000; and BSNLRP awardees up to \$8,000. Awardees are allowed to reapply for a second award of up to \$11,000. In return, recipients commit to a two-year service obligation of practicing direct patient care at a qualified facility in California.

### *Licensed Mental Health Services Provider Education Program*

The Licensed Mental Health Services Provider Education Program (LMH) is funded through a \$10 surcharge for renewal and licensure fees of psychologists, marriage and family therapists, and licensed clinical social workers in California. An awardee may receive up to \$15,000 to repay educational loans in exchange for a two-year commitment to practicing and providing direct care in a publicly funded or public mental health facility, a non-profit mental health facility, a mental health professions shortage area, or in a public mental health system.

#### ***Mental Health Loan Assumption Program***

The Mental Health Loan Assumption Program (MHLAP) was created by the Mental Health Services Act (MHSA), passed by California voters in November 2004. MHSA provides funding to develop a loan forgiveness program in order to retain qualified professionals working within the Public Mental Health System. Through the Workforce Education and Training component of MHSA, \$10 million is allocated yearly to loan assumption awards. An award recipient may receive up to \$10,000 to repay educational loans in exchange for a 12-month service obligation in a hard to fill or retain position within the county public mental health system.

#### ***Advanced Practice Healthcare Scholarship and Loan Repayment Programs***

Funded by private grants and contributions, the Advanced Practice Healthcare Scholarship Program (APHSP) and the Advanced Practice Healthcare Loan Repayment Program (APHLRP) increase the number of health professionals associated with advanced practice careers. Those awarded may receive up to \$50,000. If awarded, recipients agree to a two-year service obligation practicing direct patient care at a qualified facility in California.

#### ***Steven M. Thompson Physician Corps Loan Repayment Program***

The Steven M. Thompson Physician Corps Loan Repayment Program (STLRP) is funded through a \$25 surcharge from physician licensure and renewal fees, \$1 million from the Managed Care Administrative Fines and Penalties Fund, and private grants and donations. This program encourages recently licensed physicians to practice in Health professional Shortage Areas in California. The program authorizes a plan for repaying up to \$105,000 in educational loans in exchange for full-time service for a minimum of three years.

# FISCAL YEAR 2015 - 2016

4,767

*Total Applications Received*

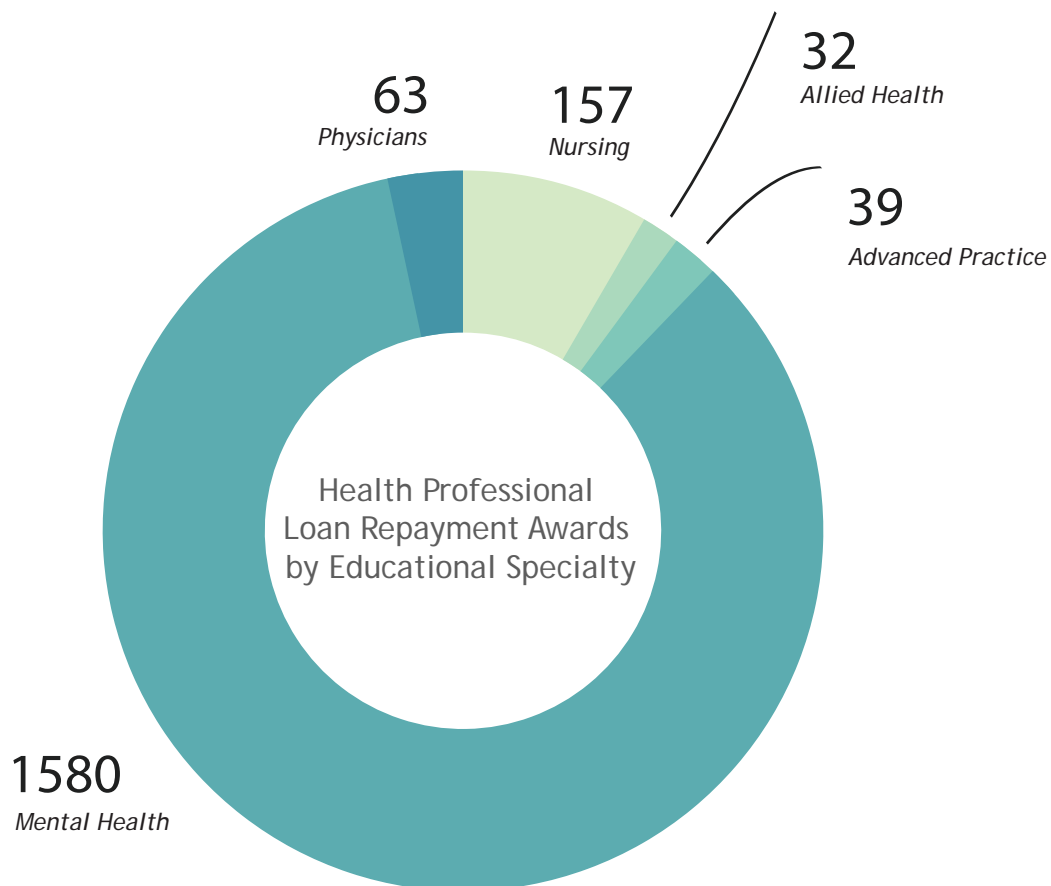
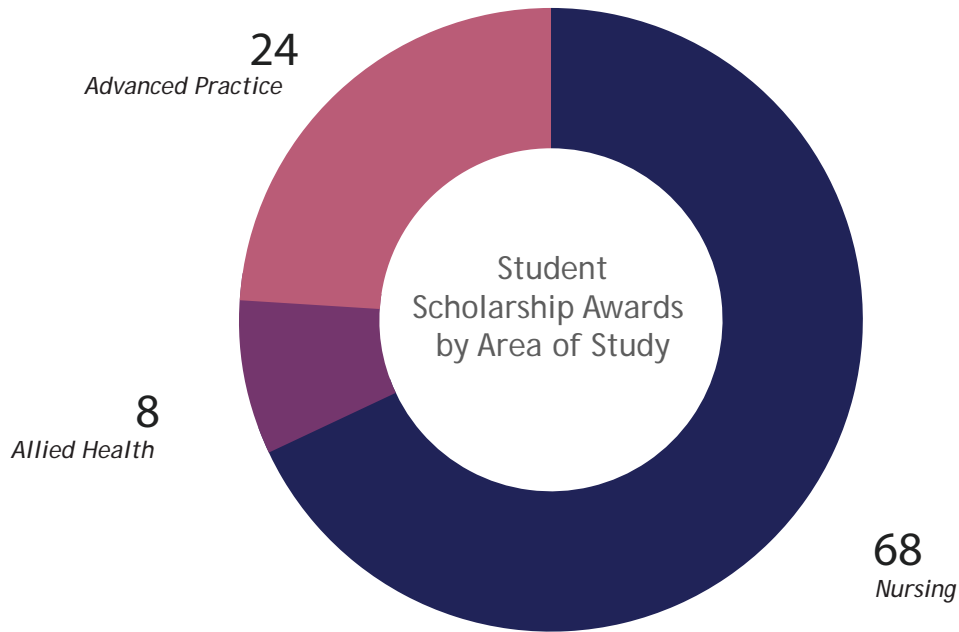
1,971

*Total Applicants Awarded*

\$22,766,878

*Total Dollars Awarded*

\* All data is as of June 30, 2016.  
All data reporting ethnicity is self-reported by awardees.



# HEALTH PROFESSIONS EDUCATION FOUNDATION

## CONSOLIDATING BALANCE SHEETS – SPECIAL REVENUE FUND JUNE 30, 2016

	Registered Nurse Education	Mental Health Practitioner Education	Vocational Nurse Education	Mental Health Services*	Total
<b>ASSETS</b>					
Cash and Cash Equivalents	\$ 3,194,488	\$ 626,270	\$ 844,164		\$ 4,664,922
Appropriated Funds Available				\$ 26,865,211	26,865,211
Due from Other State Funds	4,129	2,850	1,118		8,097
Accounts Receivable	131,863	12,003	40,995		184,861
Total Assets	\$ 3,330,480	\$ 641,123	\$ 886,277	\$ 26,865,211	\$ 31,723,091
<b>LIABILITIES DEFERRED INFLOWS OF RESOURCES AND FUND BALANCE</b>					
Liabilities:					
Student Financial Aid Payable	\$ 73,368	\$ 26,279	\$ 4,166	\$ 6,927,561	\$ 7,031,374
Reserve for Long-Term Receivables	87,439	263	33,730		121,432
Due to Other State Funds	34,911	11	5,823	569,742	610,487
Total Liabilities	195,718	26,533	43,719	7,497,303	7,763,293
Deferred Inflows of Resources: Advanced Fee Collections					
Fund Balance, Restricted for Fund Purpose	168,740	21,160	14,750		204,650
	2,966,022	593,410	827,808	19,367,908	23,755,148
Total Liabilities, Deferred Inflows of Resources and Fund Balance	\$ 3,330,480	\$ 641,123	\$ 886,277	\$ 26,865,211	\$ 31,723,091

\*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 Health Care Services controls and accounts for the full activities and assets of this fund.

The information provided here is summarized from the annual financial statement, prepared by Gilbert Associates, Inc. The complete statements can be accessed at [www.oshpd.ca.gov/hpef/](http://www.oshpd.ca.gov/hpef/).



# HEALTH PROFESSIONS EDUCATION FOUNDATION

## CONSOLIDATING STATEMENTS OF REVENUES, EXPENDITURES, AND CHANGES IN FUND BALANCES – SPECIAL REVENUE FUND YEAR ENDED JUNE 30, 2016

	Registered Nurse Education	Mental Health Practitioner Education	Vocational Nurse Education	Mental Health Services*	Total
<b>REVENUES</b>					
Surcharges for Professional Licensing Fee	\$ 1,889,630	\$ 364,660	\$ 226,196		\$ 2,480,486
Student Loan Repayments	94,497	2,235	15,433		112,165
Interest Income	21,177	3,283	7,002		31,462
Total Revenues	2,005,304	370,178	248,631		2,624,113
<b>EXPENDITURES</b>					
Student Financial Aid	1,558,669	427,048	64,961	\$ 11,310,640	13,406,318
Salaries and Benefits	243,162	66,356	60,058	346,466	716,042
Central Administrative Services	14,439	2,630	4,077		21,146
Departmental Services	73,600	27,361	17,094	196,137	314,192
Facilities Operations	51,078	4	8,318	64,593	123,993
Travel	8,258	17	143	661	9,079
Communications	2,626	2	174	399	3,201
Training	1,235	15	26	1,485	2,761
Other Operating	48,869	1,048	4,615	(6,401)	48,131
Total Expenditures	2,001,936	569,481	159,466	11,913,980	14,644,836
Excess (Deficiency) of Revenues Over Expenditures	3,368	(199,303)	89,165	(11,913,980)	(12,020,750)
<b>OTHER FINANCING SOURCES</b>					
Operating Transfers In from the California Department of Mental Health				16,913,246	16,913,246
Excess (Deficiency) of Revenues and Other Financing Sources Over Expenditures	3,368	(199,303)	89,165	4,999,266	4,892,496
Fund Balance, Beginning	2,962,654	792,713	738,643	14,368,642	18,862,652
Fund Balance, Ending	\$ 2,966,022	\$ 593,410	\$ 827,808	\$ 19,367,908	\$23,755,148

## AWARDEE TESTIMONIALS

"My name is Adrienne Panlilio and although I work in Los Angeles, I serve an area where access to quality healthcare is low and the population is primarily non-English speaking. Since graduating in 2015, I've stayed committed to this clinic, observing the gratitude of those who receive our medical services. Unfortunately, it's been very difficult to restart a life in Los Angeles after the hard work I put into these several years of school, followed by the tremendous student loans.

Luckily enough, I was granted the HPEF award last year, which truly allowed me to enjoy my job without suffering the financial struggle. I have been able to provide the healthcare that these people deserve, without the worries that my next check may almost entirely go towards my loans. The additional help in paying off my student loans has allowed me to notice a significant decrease in my balance every quarter. I am very grateful to have been given the privilege to not only help those in need, but be rewarded for doing so."

**Adrienne Panlilio, PA**  
Advanced Practice Healthcare Loan Repayment Program

"Throughout my training and career as a clinical psychologist, I have been dedicated to serving at-risk and vulnerable populations. This has included providing services to medically fragile children in a hospital setting and working with low income, culturally diverse clients in various community mental health agencies throughout Southern California. I have also been able to provide services in Spanish, and have invested significant time and personal resources towards developing and strengthening my ability to provide clinical services to Spanish-speaking clients. In my current work setting, a health clinic on a Native American reservation, I am able to serve both the Native American and monolingual Spanish-speaking populations, two historically marginalized and underserved communities. The fact that I am now able to serve these individuals in the greater area of my hometown makes it all the more rewarding.

My passion has, and will always be, to work with those individuals who are most vulnerable and underserved. Receiving the LMHSPEP award makes it possible for me to fulfill this passion, as it greatly eases the financial burden of my student loans. Without generous awards such as this, I can definitively say that it would be extremely challenging, from a financial perspective, for me to work in the types of community mental health settings I enjoy so much. I am so very grateful to the Health Professions Education Foundation for this award and for the opportunity it provides me to serve those who are most in need."

**Christopher Link, PhD**  
Licensed Mental Health Services Provider Education Program

"Currently I work in Bakersfield, California. Bakersfield is located in Central California and there is definitely a need for healthcare providers. I enjoy working with my patients and getting to know them and often times their entire families. I have become an advocate for my patients. Even though healthcare is accessible to most, there are still barriers that underserved populations face. I know that I have found my calling in life and it makes me smile when I enter the clinic and my little patient's run up to give me a hug or simply call out my name "doctora, doctora." I love that I am making a difference and have also become a role model for some of the patients.

The cost of a college education is rising in the United States. I would not have been able to complete my education had it not been for financial assistance. The Steven M. Thompson Physician Corps Loan Repayment Program has allowed me to continue to fulfill my dream of providing healthcare to underserved areas while simultaneously alleviating a large portion of my student debt."

**Kimberly Dixon, MD**  
Steven M. Thompson Physician Corps Loan Repayment Program

A background image showing a close-up of several hands of different skin tones clasped together in a supportive grip. The image is slightly blurred and has a blue tint.

## HEALTH PROFESSIONS EDUCATION FOUNDATION

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Tino Raya, Senior Program Officer

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Debbie Harrison, Executive Assistant

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### *2015-2016 Partners*

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The California Endowment

Kaiser Southern California  
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The California Wellness Foundation



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