

## **Tennessee Medical Foundation Strategic Plan 2022-2023**

The mission of the Physician's Health Program (PHP) is to protect patients through identification, intervention, rehabilitation, and the provision of advocacy/support for physicians and other health professionals impaired by addictive disease, mental or emotional illness.

The TMF operates solely on contributions from individual physicians and the general public, hospitals, medical groups and other health organizations, as well as grants.

### **Clinical Goals**

- Outcomes Study – Dr. Michael Baron will contract with a statistical professional to perform an outcomes study. The goal of the study is to examine the effectiveness of the TMF’s services to the medical community and determine what adjustments may need to be made to better serve the recovery community. The study will evaluate records from the last 5 decades and provide valuable information regarding how the TMF’s policies and practices affect recovery outcomes.
  - We anticipate the cost of the study to be \$20,000
- Policy & Procedure Writing – Policy and Procedure writing are ongoing with contributions from Dr. Michael Baron, Jennifer Rainwater, and Case Managers – Dr. Nancy Hooper and Dr. Tamiko Webb.
  - As we emerge from the effects of Covid-19 and assess new methods of toxicology testing, participant meetings, etc. we need to continually assess our policies and procedures to be sure they are 1. Being followed consistently, 2. Reflect reality in practice, and 3. Follow the law. Policies and procedures are used to ensure confidentiality, consistency in electronic record keeping, and compliance with Federal and State Laws.
- Participation in the Federation of State Physician’s Health Programs (FSPHP) – Dr. Michael Baron has been an active member of the FSPHP since joining the TMF in 2017 and has served on multiple planning committees during that time.
  - This year Dr. Baron has been honored to be elected President and will begin his two-year term as President-Elect this year.
  - Ms. Jennifer Rainwater, Ms. Brenda Williams-Denbo, Dr. Nancy Hooper and Dr. Tamiko Webb have also joined the FSPHP as associate members.
  - The TMF’s increasing involvement in the FSPHP will be beneficial in facilitating better and on-going communication between state programs, create a collaborative environment where State PHP’s can continue to help each other with policy writing, emerging challenges, effective monitoring techniques, etc.
- Paperless Charting – In 2018 the TMF implemented a paperless charting system with Affinity eHealth/Spectrum 360 Compliance. Use of this system has continued to evolve and become more efficient with continued use. Charting is now completely paperless with the exception of signed Monitoring Agreements. Systems will continue to be customized as needed.
- Annual Caduceus Retreat – In-Person Caduceus retreats resumed in 2021 with great attendance and success. Dr. Michael Baron and the TMF staff will pursue speakers for the event that will address the on-going needs of medical professionals in recovery and provide helpful insights to our participants. The retreat is provided each year in June.

- Expansion of Regional Caduceus Groups – As the TMF becomes more recognized throughout Tennessee we anticipate the need for additional regional Caduceus groups (small support groups). These will be added as needs arise.
  - A new regional group was added in March 2022 in Clarksville, TN.
- Continued Education throughout Tennessee – As Covid-19 restrictions have been lifted, Dr. Baron has had a dramatic increase in in-person speaking opportunities. This will necessitate more funding for travel and promotional materials.
- Tennessee Professional Screening Questionnaire (TN-PSQ) - Two years of activity on the TN-PSQ have shown the online mental health screening tool is helping to address the “parallel pandemic” affecting Tennessee health professionals in the era of COVID.
  - That according to TMF leaders who say data and user comments appear to confirm the new resource is reaching its intended population and goals. More than 400 individuals in health professions served by the TMF have utilized the site since it was launched in February 2020 as a proactive way to address rising mental health referrals to the Physician’s Health Program.
  - The TN-PSQ is a free, confidential, interactive online mental health screening tool based on the PHQ-9 questionnaire — a widely-accepted vehicle for self-assessment of common mental disorders; it offers a response from and optional anonymous interaction with a licensed mental health professional for further assistance and possible connection to nearby mental health resources.
  - Its target audience is health professionals who may not contact the TMF Physician’s Health Program directly; the goal is to reach them before a mental health condition leads to more serious problems affecting patient safety and/or resulting in a referral to the TMF or action by an employer or state licensing board.
  - Development Coordinator, Ms. Brenda Williams-Denbo and Dr. Michael Baron, have been and will continue to be diligent in promoting the TN-PSQ throughout Tennessee. The Tennessee Health Related Boards have and will periodically promote the tool via mass email to licensed health professionals in the state.

## **Development Goals**

### **Fundraising**

- Implementation of Donor Management Software – The TMF is in process of implementing a new donor management software which will better facilitate multiple methods of donating as well as enable mass electronic communication with our donors.
  - Migration of existing donation data is nearly complete.
  - Staff training has begun and will continue as additional modules are added.
  - The new system is already in use for online donations and events such as our Annual Caduceus Retreat.
  - Full implementation will allow us to better analyze donor data, identify trends, and communicate giving campaigns more effectively and in multiple ways.
- Continued Solicitation of Hospitals – As was anticipated, Covid-19 caused a dramatic decrease in giving to the TMF by hospitals. We seek to increase hospital giving through targeted campaigns, personal visits (including digital formats for solicitation) and continued education.
  - We have seen an increase over the past year as hospitals begin to recover from the devastating effects of the pandemic.

- Continued contact with hospital leadership is important as smaller hospitals are acquired by larger hospital corporations. Ms. Williams-Denbo is prioritizing visits with hospital leadership throughout Tennessee to ensure she is familiar with current leadership.
- Continued Cultivation of Partnerships – Ms. Williams-Denbo will continue making contacts with and visits to healthcare organizations that are current or potential partners for the TMF.
  - These include medical practices, specialty societies, medical schools and health professional training programs.
  - This cultivates a mutually beneficial relationship that increases awareness of TMF services and resources, and in turn leads to increased support.
- Increase Individual Giving - We seek to increase individual giving through targeted campaigns, providing additional digital formats for solicitation, increased online communication and continued education about our program throughout the state.
- Private Foundation to Public Charity – the TMF is in the 5 year process of moving from a Private Foundation to a Public Charity. While in the process, the TMF may function as a Public Charity.
  - This change allowed for more methods of donation by individuals and other foundations and also allows higher donor tax-deductibility giving limits.
  - Ms. Williams-Denbo will continue to explore additional resources available to the TMF now that this transition has occurred.

### **Communication**

- Preparation of Annual Report – the TMF published its first Annual Report in early 2022 for 2021.
  - This report will now be produced annually.
- Newsletter Refresh – The TMF newsletter going forward will be primarily donor-focused, i.e., seeking to present news, clinical articles, and communication from TMF leaders from the perspective of the good work being done with the help of supporters and partners. This is a subtle change but is a current best-practice for nonprofit communications.
- Digital Newsletter – Starting Fall 2022, the TMF will deliver its bi-annual newsletter in a digital format as well as print, based on the receiver’s preference. This option is made possible through the new NeonOne donor database system.
- Social Media – The TMF will continue to engage social media audiences on Facebook and LinkedIn, providing helpful updates on TMF activities and resources, as well as general topics relating to wellness and impairment.

### **Administrative Goals**

- TMF Board Rotation – the TMF seeks to further diversify our Board of Directors. As members rotate off of our Board we will seek qualified members who reflect the diversity of people in the medical community. We have been intentional in this effort and will continue to do so.
- Annual TMF Board Retreat & Training – the TMF has implemented an extensive training manual for all TMF Board members in order to ensure TMF by-laws are being followed. The Board meets three times per year with an annual weekend meeting/retreat in October.
- Bookkeeping – Bookkeeping tasks have been partially moved in-house as a cost-savings measure. The TMF will continue to have monthly accountant visits for oversight and an annual audit by a vetted accounting firm.

- Re-Assessment of Impaired Physician’s Loan Fund – the TMF Board, Dr. Michael Baron and Ms. Jennifer Rainwater are in the process of re-assessing the parameters of what is currently known as the TMA Impaired Physician’s Loan Fund. The fund was created by the Tennessee Medical Association and is managed by the TMF. However, we found that the parameters of the loan were outdated and a new Board was needed to oversee it. The TMA has agreed to transfer ownership of the fund to the TMF and appoint a three-member Board pending approval by their Board. The name of the fund will also be changed to more appropriately reflect its purpose. These changes will make the loan fund more accessible to medical professionals who need financial support for treatment.
- New IT Policy – Ms. Jennifer Rainwater has drafted a new Information Technology Policy for the TMF which will be implemented upon TMF Board Approval on June 8, 2022.
  - Continued review of the IT Policy will occur as new security features are added. Ms. Rainwater meets quarterly for a Technical Business Review with the TMF’s IT services provider.
  - An Incident Response Plan has been included in the new IT Policy which will ensure that all TMF employees know what procedures to follow in the event of a security breach.

### **Longer-Range Goals**

- Greater Diversity – It is an important priority of the TMF to become more diverse both in representation on our Board of Directors but also toward those who are potential participants in our program and potential donors to our program.
  - We will seek venues in which to have a more diverse education presence in Tennessee.
  - We will continue to increase the diversity of our Board of Directors.
  - We will continue to ensure inclusivity in our communication with participants, potential participants, donors and potential donors, education venues, and in our employment practices.
- Additional Revenue Sources and Methods – As we are migrating from a Private Foundation to a Public Charity, we have the opportunity to explore additional revenue sources such as grants from other foundations. Also, public charities have a higher donor tax-deductible giving limit which will allow donors more tax benefit from giving.
- Additional Education and Resources for Rural Areas in Tennessee – Medical professionals in rural areas often have fewer resources and limited access to mental health services.
  - We will work toward providing more information and resources to critical access hospitals with targeted communication campaigns.
  - We will target rural areas with information specific to their needs.
  - We will expand regional Caduceus groups in these areas as needed.
  - We have already formed a Zoom Caduceus group for TMF participants who live in rural areas and provide Zoom quarterly meetings as well. The decrease in Covid-19 restrictions has allowed our case managers to travel more often for quarterly visits.