

OPSF Scholarship Awards: 2003-2004

Evelyn Balogun, MD *(Renewed Scholarship)*

Dr. Balogun is currently in her practicum year of training at the Johns Hopkins Bloomberg School of Public Health. Her experience in the Masters of Public Health Program has introduced her to the myriad of roles of an occupational physician. Dr. Balogun believes that Occupational Medicine focuses not only on the health of individual workers but also examines the health of a population by observing and measuring general public health at an aggregate level. In addition to her practical experience of treating occupational injuries, she is becoming familiar with the preventive aspects of Occupational Medicine such as identifying potential work related hazards ranging from chemical, physical, and biological agents to psychological stressors. Dr. Balogun feels she will not only have the clinical skills necessary to diagnose and treat work-related problems, but will also possess the analytical tools required to implement preventive measures to control exposure. By attempting to understand the role that employers and employees can play in creating a healthy work environment, she hopes to facilitate that interaction in a corporate or clinical setting.

Brian Case, MD *(Renewed Scholarship)*

Dr. Case first heard of OEM from his father, an allergist, who impressed upon him the importance of taking a good occupational exposure history in the proper diagnosis and treatment of asthma. Dr. Case's interest in the specialty was furthered during a rotation at the University of Cincinnati, where he encountered a number of patients with occupational asthma. Dr. Case hopes to continue exploring ways of preventing occupational asthma, but also has an interest in eventually becoming an expert in the field of performing arts medicine. "With years of practice necessary to master a musical instrument, there is much opportunity for the development of repetitive motion injuries," notes Dr. Case, an accomplished violinist. Dr. Case is currently in his practicum year of training at the University of Cincinnati.

Erik Won, DO *(Renewed Scholarship)*

Dr. Won will be completing his two-year residency at the Harvard School of Public Health and will become part of the St. Jude Heritage Medical Group in Fullerton, California. Although initially entering a career path in emergency medicine, Dr. Won noticed that many emergency and clinic patients shared a pattern that crossed cultures and epidemiological boundaries. The majority of diseases and illnesses he observed were due to preventable factors and occupational

hazards that had taken a cumulative effect on the health of the various communities. From these observations, Dr. Won made a conscious decision to change career paths to OEM. "I had come to the realization that to make real, significant, and long-lasting change to the health of our communities, we need to focus on health education, preventive measures, and improving the workplace environment."

Lauretta Coumarbatch, MD

Dr. Coumarbatch is currently in her practicum year at the University of Medicine & Dentistry of New Jersey—Robert Wood Johnson Medical School. Her interest in occupational medicine developed from her prior work as a pediatrician in the U.S. Virgin Islands. The public health system in the Virgin Islands offered little or no disease prevention, environmental safety, occupational health or medical surveillance programs. Dr. Coumarbatch addressed some of these issues in the hospital where she was employed by promoting Hepatitis B immunization and needle stick protocols among the nurses, safety and ergonomics on the units, and arranged stress reduction retreats/conferences for the nurses. Dr. Coumarbatch decided to pursue a career in occupational medicine because she felt she lacked the training necessary to be as effective as she hoped to be. Her future goal is to practice occupational medicine in a university clinic setting, complete clinical research with a focus on Fibromyalgia, and teach.

Robert Gordon, MD, MS

Dr. Robert Gordon is in his second year of the Occupational Medicine Residency Program at the University of South Florida where he is the Chief Resident. He became interested in occupational medicine during his Internal Medicine Residency where he had the opportunity to work with an occupational medicine physician. During this experience, Dr. Gordon found the field challenging and stimulating and has been interested in it ever since. Dr. Gordon is board certified in Internal Medicine and he would like to practice clinical occupational medicine in Illinois after completing his training.

Britt Hatfield, MD

Dr. Hatfield has served as a United States Navy physician over the past four years. During this time, Dr. Hatfield has had the experience of preventing and treating occupational and environmental illnesses and injuries in the United States, Western Europe, North Africa, and the Balkans. In an effort to reduce injuries in active duty United States marines and

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sailors, Dr. Hatfield has been working with the Orthopedic Surgery department head at the Camp Lejeune Naval Hospital to research the frequency, causes, and locations of the orthopedic injuries that are treated at the orthopedic clinic. Currently, Dr. Hatfield is in his academic year of training at Harvard School of Public Health. He plans to pursue a career path that will allow him to teach, treat patients, and continue research on the causes of occupational injuries and ways to prevent them.

Laura Kaufman, MD, PhD

With an initial interest in working for the U.S. Public Health Service (USPHS), Dr. Kaufman received her MD degree from the University of Cincinnati's Physician Scientist Training Program. During this time, she also completed a PhD program in Epidemiology. Her dissertation was on the study of jet fuel/solvent exposure and its potential neurological damage (hearing and balance) at Hill AFB. It is very satisfying to her to know that her findings could help reduce risks among military and civilian jet maintenance personnel. Dr. Kaufman is currently in her practicum year of occupational medicine training at the University of Utah.

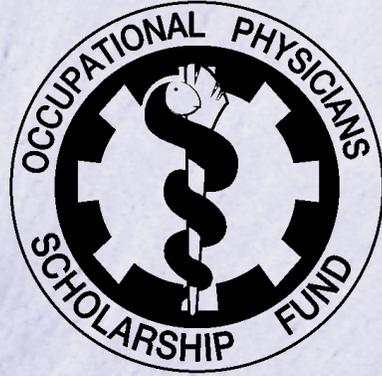
She brings a solid medical and epidemiological background to occupational medicine but says that USPHS is yielding to her hope for a university-based career where she can resume her research, continue teaching, and participate in a multi-specialty group doing occupational medicine.

Bridget Bagert, MD

During her fellowship at Oregon Health & Science University, Dr. Bagert enrolled in the "Human Investigations Program" for physicians interested in research. She pursued research opportunities in epidemiology that relate to multiple sclerosis and is currently a co-investigator in an ATSDR funded project that seeks to validate a method of estimating the prevalence of multiple sclerosis at the county level. Also, in the past year, Dr. Bagert has volunteered for the Oregon Environmental Council, a local non-profit organization, where she works on an initiative that focuses on the adverse health effects of various forms of environmental degradation. Dr. Bagert is currently in her academic year of training at Harvard School of Public Health. She intends to dedicate her career to the study of environmental causes of neurological disease, in the area of research and a realm of public policy.

2003 ANNUAL REPORT

Occupational Physicians Scholarship Fund



Report of the Chair

Scholarships



For the 2003-04 year, forty-four applicants were reviewed by the Candidate Review Committee (CRC) chaired by Lloyd Tepper, MD. The CRC is responsible for reviewing all applications and selecting the most promising scholars from the candidate pool. Eight very qualified scholars were selected to receive funding for the 2003-04 year. The 2003-04 Scholars selected by the CRC vary greatly in background and will become part of the growing number of physicians trained in occupational and environmental medicine (OEM) by the Fund. For these medical doctors, and over 115 others selected over the past 15 years, support from the Occupational Physicians Scholarship Fund (OPSF) has been instrumental in completing OEM residencies. Brief descriptions of these scholars are presented on pages 4-5.

Fund Management

The Finance Committee comprising Joseph Romano, MD, Thomas McDonagh, MD and Mr. James Russell, are responsible for management of the OPSF's investment portfolio. Under the direction of the Finance Committee, OPSF's assets have been carefully allocated and returned substantial gains in 2003. At the end of 2003, projections are for the OPSF to be able to fund scholars through 2010. A financial update appears later in this report.

Special thanks goes to Mr. James Russell, retired Vice-President, Portfolio Management at Metropolitan Life Insurance Company, who over the years has given of his time and helped to skillfully manage the Fund through a balanced investment strategy.

OPSF Activities

OEHF Collaboration for Funding

OPSF continues to explore with the Occupational & Environmental Health Foundation (OEHF) a corporate appeal and planned giving program to keep the scholarship program viable long-term. Discussions continue with the OEHF on how to effectively develop and implement combined appeals. In addition, the OPSF is working with the OEHF in development of an education strategy for the OEHF which would augment the work of OPSF.

The OPSF continues to maintain a current roster of residency programs and appropriate contact information. In 2004, the OPSF will develop a report on the Fund since its inception including number of scholarships granted, types of activities scholars are currently engaged in, and financial information on the Fund. This will assist with future appeals the Fund may implement.

I would like to provide a special thanks to all OPSF Board members. The Board members contribute their expertise and time for the advancement of occupational and environmental medicine. Through their dedicated efforts, funding of OEM residencies continues and the Board members continually investigate other initiatives for maintaining the OPSF long-term.

Thank you.

Treasurer's Report

In 2003, the OPSF investment portfolio realized substantial gains. The portfolio is invested in a conservative manner in high performing mutual funds with low expense ratios. We maintained a 60/40 equity to fixed income ratio with our investments for most of the past year. The OPSF investment portfolio had gains of approximately 15% while maintaining a cautious approach.

For the year ended December 31, 2003, OPSF had \$88,758.06 in revenue and \$398,097.38 in expenses, of which \$343,530.00 went to scholars. Administrative expenses for the fund continue to decline, with administrative costs being 14% of the overall operating expenses in 2003 compared to 19% in 2002 and 21% in 2001. The OPSF investment portfolio had gains of \$344,199.17. Net assets increased by \$34,859.85—from \$2,799,834.90 in 2002 to \$2,834,694.75 in 2003. On page 3 is a detailed statement of financial activities for OPSF summarized from the financial statements prepared by the Fund's Certified Public Accountants.

The OPSF is a self-liquidating fund, and based on current projections the Fund will continue to provide grants through approximately 2010. The Finance Committee is actively managing the Fund's assets to maintain/enhance the length of the time horizon for providing scholarships. At the same time, OPSF is discussing options for securing additional funding to continue beyond 2010.

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Thomas J. McDonagh, MD
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OPSF Statement of Activities and Changes In Net Assets
For the year ended December 31, 2003

REVENUE

Grants and Contributions:

Corporate and Foundations

Other

Interest and Dividend Income

88,758.06

88,758.06

EXPENSES:

Scholarships:

Grants

Travel Reimbursements

342,030.00

1,500.00

343,530.00

Administrative Expenses

54,567.38

Total Expenses

398,097.38

Excess Expenses Over Revenue Before Realized and Unrealized Market Gain

(309,339.32)

Add:

Realized Gains (Loss) on Securities

(59,203.66)

Unrealized Market Gain (Loss) on Securities

403,402.83

344,199.17

Changes in Net Assets

34,859.85

Net Assets Beginning of Year

2,799,834.90

Net Assets End of Year

\$2,834,694.75

Statement of Financial Position – December 31, 2003

ASSETS

Current Assets:

Cash in Bank

\$ 576.28

Prepaid Expenses

5,595.90

6,172.18

Investments:

Money Market Fund:

Vanguard Prime Money Market

1,226.30

Mutual Funds:

Vanguard Wellesley Fund

Shares

47,081

284,366.37

Vanguard Short Term Corporate Fund

2,219

921.42

Vanguard Wellington Fund

57,973

2,545,089.05

2,831,603.14

Property and Equipment:

Computer Equipment

6,778.94

Furniture

1,900.92

8,679.86

Less Accumulated Depreciation

8,679.86

Total Assets

\$2,837,775.32

LIABILITIES AND NET ASSETS

Current Liabilities:

Accounts Payable

3,080.57

Net Assets:

Unrestricted

2,834,694.75

Total Liabilities and Net Assets

\$2,837,775.32