Report to the COMMUNITY
2012–2013
MISSION
Samuel Merritt University educates students to become highly skilled and compassionate healthcare professionals who positively transform the experience of care in diverse communities.

VISION
Samuel Merritt University will become nationally recognized as a premier, multi-specialty health sciences institution. Expert faculty and staff will shape an inclusive learning environment where all students experience best teaching practices and state-of-the-art-learning approaches. The University will select and support students who will flourish in the rigorous academic programs, learn to practice expertly, and pass licensure or certification examinations on first attempt.

VALUES
At Samuel Merritt University, we value:

A learning environment where we challenge ourselves and our students to think critically, seek mastery, and act compassionately.

A collegial environment where we are fair, respectful, and behave with integrity.

A collaborative environment where we partner with one another and with others in the community.

An innovative environment where we take reasoned risks and move nimbly.

A results-oriented environment where we provide and expect exceptional performance and service.
Samuel Merritt University...

» is the largest source of new registered nurses in California, and the largest provider of physical and occupational therapists, physician assistants, and podiatric physicians in the greater Bay Area

» educates students who experience some of the highest rates of employment (more than 90 percent) upon graduation

» has a nationally recognized, state-of-the-art Health Sciences Simulation Center (HSSC) and a Motion Analysis Research Center (MARC)

» retains students across all programs at a rate of 97 percent in their first year

» receives high satisfaction rates from 90 percent of employers who hire SMU graduates

» has an institutional strategic goal and commitment to making its campuses more diverse and inclusive of all students, faculty, and staff

» students say upon entering the University that the reputation of the school or program is their top reason for attending SMU

» alumni across all programs indicate high levels of satisfaction with their overall clinical skill competence at rates of 92 to 100 percent
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Behind the success of a premier institution of higher learning is the leadership of its president. Samuel Merritt University (SMU) has achieved local, regional and national recognition for the quality of its academic programs and the competence of its graduates because of the leadership of President Sharon Clark Diaz over the last 40 years.

I agreed to become Chair of the Board of Regents because I share President Diaz’s view that the future of the University depends on continued growth, both in our programs and in attracting the most qualified candidates. SMU has never stood still with Sharon Diaz at the helm and continues to keep up with the rapid changes taking place in the healthcare industry.

The Board of Regents of Samuel Merritt University—joined by its students, faculty and staff, and the larger community of donors, partners and friends—congratulate President Diaz on her four decades of dynamic and steadfast stewardship. Collectively, we dedicate this issue of the Report to the Community to her many achievements in inspiring and growing a vital and enduring health sciences University.

In the following pages, you will read about her educational vision, business acumen and tireless dedication to SMU in her own words and those of people who have worked closely with her. I also invite you to join us at a Tribute Dinner on October 12 that will honor President Diaz and raise crucial funds for student scholarships.

At the heart of the University’s mission is the education of students who want to dedicate their lives to improving the quality of care for patients in hospitals, clinics, the home, or community centers. This report features a story about University plans to implement a cross-disciplinary program known as interprofessional education (IPE). IPE is a future-oriented educational model, designed to enhance the quality and safety of healthcare through teamwork and collaboration among medical and healthcare practitioners and clinicians. We believe IPE will enable our students to become effective healthcare providers and to meet the challenges of healthcare reform.

The University’s commitment to supporting a diverse and inclusive learning community has been generously expressed through an impressive level of funding in 2013 for our economically disadvantaged students. We are pleased to inform you that, for the second year, SMU received a federal award of $1.2 million from the Health Resources and Services Administration (HRSA) to fund scholarships in our Master of Physician Assistant and Doctor of Physical
Therapy programs. These funds help us recruit and retain minority and underrepresented students, enabling the University to achieve mission-critical strategic diversity goals.

Doctor of Physical Therapy student Wendy Marrufo would like to use her SMU graduate education to help young people from under-represented communities enter the healthcare profession. A recipient of two named scholarships, she is one of our many gifted and compassionate students who came to the University to make a difference in the future of healthcare in their communities. I know you will enjoy reading her compelling story.

We thank you for your support of Samuel Merritt University, and remain grateful for your belief in our mission to transform the experience and quality of healthcare.

Sincerely,

Thomas Drese
Chair, Board of Regents
President Sharon Diaz Celebrates 40 Years at SMU
Passion & PERSEVERANCE

Forty years at Samuel Merritt University (SMU) has earned President Sharon Diaz many accolades. People who have worked closely with her choose words like indomitable, savvy, strategic, tenacious and visionary to describe her.

Diaz’s success in shepherding the institution through four decades of remarkable change and expansion is widely attributed to her ability to build relationships with people and bring them together. Longtime colleague Abby Heydman, PhD, calls Diaz “politically astute.”

“She’s probably the most able political administrator I’ve ever known,” agrees Irwin Hansen, former CEO of Summit Medical Center. “It’s been one of the most satisfying things in my career to work with her.”

Like others, SMU Vice President of Academic Affairs Scot Foster, PhD, notes that Diaz has outlasted numerous CEOs at the medical center.

“She is very politically adept at working with a lot of different people and under a lot of different pressures,” says Foster. “The woman has a knack for administratively networking for the benefit of the University.”

“You can’t do what I’ve done all these years and not be political,” says Diaz. “There’s no question in my mind that I am a political being and I have done it for the needs of the University that I love.”

Cornelius Hopper, MD, who joined the SMU Board of Regents in 1997 and served as its chair from 2000 to 2011, says Diaz’s “absolute identification with and loyalty to the University” best explains her perseverance.

“Her commitment to Samuel Merritt has never wavered,” says Hopper.

FORTY YEARS OF TRANSFORMATION

It all began in 1973 when Diaz became a medical-surgical nursing instructor at Samuel Merritt Hospital School of Nursing, then an all-girls program where unmarried students were required to live in campus housing. It was a simpler place and she soon came to know every student, faculty and staff member.

“I don’t think we had a single person on campus with a doctorate,” she says. “And research was the farthest thing from our vision.”
With a lot of help from her colleagues, Diaz transformed a hospital-based diploma school of nursing into an intercollegiate baccalaureate program—the first school in the country to do so—and eventually into a health sciences university offering five disciplines and a mix of master’s and doctoral degrees.

Diaz has traveled far from her roots. She grew up in Bakersfield and was the first of her generation on both sides of her family to attend college. She chose San Jose State University, in large part because she could live nearby with her older sister. It was at San Jose State where she met her husband, Luis Diaz, who was studying mechanical engineering and was a member of the nationally ranked soccer team.

After graduating with a bachelor’s degree in nursing, Diaz went to work in the intensive care unit at Kaiser. Soon after, her alma mater called and asked if she was interested in teaching and she decided to try it.

“I liked turning on the light, showing them that it wasn’t what I knew but how they understood it,” says SMU President Diaz.

She took the teaching job at Samuel Merritt because of the school’s passion for preserving the tradition of excellent clinical education as well as its willingness to buck trends. A subsequent attempt by the faculty to form a union failed and resulted in many of the teachers quitting, but Diaz remained.

In 1976, she was appointed acting director and then director of the School of Nursing. In many ways, it was trial by fire. With few faculty left and an accreditation report due, Diaz struggled to stay afloat. She was not familiar with the hospital bureaucracy and enrollment was beginning to drop. She also had a baby son, who she would place on the floor while meeting with students.
It is fitting that a dinner on October 12 to honor President Sharon Diaz’ 40th anniversary at Samuel Merritt University (SMU) will raise critically needed scholarship funds.

The lives and careers of students have long been a major priority for President Diaz. In recent years, she has focused on making education accessible to disadvantaged and under-represented students.

“Sharon has always been someone who felt strongly about solving the problems of students,” says Abby Heydman, former dean of nursing and academic vice president. “Now, she is concerned with helping them to obtain financial aid.”

Because of the high costs of higher education, student loan debt in the United States has grown dramatically over the last decade. SMU is striving to ease the burden of educational costs for students by increasing its financial support of students through tuition subsidies.

It is part of SMU’s broader commitment to address unequal levels of healthcare quality, access and outcomes among diverse ethnic and socio-economic communities by educating students who reflect the populations they will serve.

“The University has been privileged to educate hundreds of students who overcome challenging and unbelievable obstacles to pursue their dream to become a nurse, a physical or occupational therapist, physician assistant or podiatrist,” says President Diaz. “Yet, each year, we learn how increasingly difficult it is for people interested in earning a SMU degree and their families.”

The Sharon Clark Diaz Scholarship Dinner will take place on Saturday, October 12.
"She took the risk of moving into administration early because she thought she could make a difference," says Heydman, former dean of nursing and academic vice president. Six years later, Diaz was appointed to be the school’s first president. Since then, the woman who describes herself in her early years as “a real rabble rouser” has never shied away from a challenge or resisted change.

Hopper says that Diaz has continually “pushed the boundaries” by strategically adding new programs to SMU’s academic portfolio, always considering the advantage to the University as well as the benefit to the community it serves. Perhaps her boldest choice was to merge with the California College of Podiatric Medicine, a prestigious school that had fallen on financial hard times. Hopper recalls that it was a decision met with some skepticism by the board, but turned out to be a good one.

“It was a great school fulfilling a need and presented a great opportunity for Samuel Merritt to increase its visibility and credibility,” he says.

**UNFINISHED BUSINESS**

President Diaz shows no signs of slowing down after 40 years. In fact, she says she is energized by looking for new ways to prepare students for the rapid changes taking place in healthcare and technology. With the upcoming launch of national healthcare reform and educational transformations underway at SMU, Diaz has little time to consider retirement.

“I don’t get bored because every day is different," she says. “I absolutely love what I do. Mostly it’s really fun to watch people learn and grow. It’s fun to be around really smart and motivated people.” But above all, she says, “I still have unfinished business.”

Her attitude comes as little surprise to those who have worked with Diaz during the past four decades. Despite her accomplishments, they say, she does not dwell on her success but instead moves on to the next challenge.

**PREPARING FOR HEALTHCARE REFORM**

Among those challenges is how the Affordable Care Act will change the healthcare industry and trigger major changes in the scope of practice for medical practitioners when millions of uninsured Americans gain access to care.

“We have an unprecedented opportunity in the next 10 years. It’s almost beyond our ability to envision when you think of the number of people who will be able to seek healthcare,” says Diaz. “We have the potential to improve the quality of care and the accessibility of care in a very tangible way. Our goal becomes to teach people to do things differently.”

Many of her colleagues say Diaz excels at understanding what the healthcare needs are going to be in the future and positioning the University to fulfill those needs. As a result of her efforts, SMU is well positioned to prepare its students for the new healthcare landscape. That’s due in large part to the diversification of programs that has taken place under her watch, according to Hopper.

“It became clear as far back as the late ‘80s, long before the healthcare law was written, that we needed professionals to perform some of the responsibilities that physicians had been fulfilling,” says Hopper. He points specifically to the SMU programs that train nurse practitioners and physician assistants as critical to realizing the goals of federal healthcare reform.

“Partly because of Sharon’s vision, SMU is poised to again generate people to fulfill those gaps that will become increasingly apparent as the Affordable Care Act is implemented in the coming years,” he says.

**DIVERSITY AS A PRIORITY**

One of her most lasting legacies may well be her personal commitment to institutional diversity. Longtime colleagues of Diaz point to her work to support underrepresented students, including fundraising for scholarships and establishing an Office of Diversity and Inclusion—considered remarkable for a school of its size.
“The push to make SMU an institution where everyone feels appreciated and accepted and where the ideals of cultural awareness and respect are a part of the University culture can only happen when the priority to make this happen comes from the president,” says Irma Walker-Adame, MS, associate dean for administrative affairs at SMU’s California School of Podiatric Medicine. “We have a way to go, but I can see progress because Sharon has made this a priority.”

EXPANDING EDUCATIONAL CAPACITY
The campus sculpture known as the Universalis Centralis, with steel rings powered by the wind, is an apt symbol of past and future transformations at SMU. The sculpture, which now sits in front of the Peralta Medical Office Building and serves as the University’s logo, was designed to reflect the ever-changing world of healthcare, growth and learning.

The woman who describes herself in her early years as “a real rabble rouser” has never shied away from a challenge or resisted change.

Keeping up with the dramatic changes expected in healthcare in the coming years will require continued growth at SMU. Thomas Drese, chair of the Board of Regents, says he and Diaz are both committed to adding a Doctor of Pharmacy program and expanding current programs to meet future workforce needs. “In all likelihood there will be a shortage of healthcare professionals with all the people coming into the system,” says Drese.

To achieve those goals, Diaz and the board are working with Sutter Health to explore ways to enlarge the Oakland campus and provide advanced training to its hospital staffs. Diaz is optimistic about the future of the University’s 14-year affiliation with Sutter and applauds the health system for making capital investments in its hospitals and launching a new insurance plan. “With the right strategy, we have a huge opportunity in our association with Sutter, which is extraordinarily well positioned to meet healthcare reform,” she says.

KEYS TO HER SUCCESS
Drese and his board colleagues say that Diaz has worked hard to advocate for the only university in a multi-hospital system. An even bigger key to her leadership success, they say, has been to surround herself with excellent employees and keep them satisfied.

“She has the ability to recruit talented people and build them into teams and retain them over a long period of time,” says Hopper. “It’s remarkable the number of senior faculty and staff at SMU. It’s a reflection of the kind of institution she has built. It’s a good place to work.” Walker-Adame agrees: “President Diaz has hired and retained credible senior administrators who have helped to grow the University.”

One of those administrators is SMU AVP Foster, who says Diaz’s integrity and financial stewardship of the University are the driving forces behind her longevity. “She has put the University in an enviable position that most colleges and universities of our size do not enjoy,” Foster says. “It provides us with much more flexibility in areas of program growth, support for faculty and innovative instructional methods.”

Diaz has high praise of her own for her colleagues. In particular, she says she is proud of faculty members for pioneering teaching techniques like healthcare simulation and for earning the second Fulbright Award at the University. “People see us as having real expertise in our domain and it is a credit to our academic leadership and the faculty,” says Diaz. “There is amazing work going on at SMU.”
INTERPROFESSIONAL education occurs when students from TWO or MORE professions learn about, from and with each other to ENABLE effective COLLABORATION and IMPROVE health outcomes.

—WORLD HEALTH ORGANIZATION
Interprofessional Practice to GUIDE THE FUTURE

The new federal Affordable Care Act requires greater use of interprofessional practice, relying on studies that show better teamwork among medical professionals enhances the quality and safety of healthcare. An initiative underway at Samuel Merritt University (SMU) will put the interprofessional approach into action among its health science programs.

“There will be major changes in the scope of practice for advance practitioners and we could not be better positioned,” says SMU President Sharon Diaz. “The best and most effective care is going to be delivered by a team of people working together. If our students can learn that from the time they’re in the classroom, we’re going to be delivering to employers the kind of healthcare professionals they want.”

SMU is planning to incorporate interprofessional education (IPE) into its culture and across its curricula, with the goal of preparing every SMU student to practice collaborative healthcare.

“All of the models of healthcare reform are calling for team collaboration in the delivery of care,” says SMU Nursing Professor Karen Wolf, a longtime advocate of interprofessional practice. “Samuel Merritt University has a wonderful opportunity because we have multiple healthcare professions here and can put our students into teams to learn skills to be more effective in patient-centered care.”

Assistant Academic Vice President Terry Nordstrom is spearheading the SMU initiative, and has convened a steering committee of representatives from all University programs as well as enrollment and student services to develop a vision and implement opportunities for interdisciplinary cooperation. The committee, working closely with the Academic Council, believes it will take at least five years to fully realize interprofessional education at the University.

“I intentionally chose faculty members with expertise in interprofessional practice who bring energy, excitement and commitment to it,” says Nordstrom.

Faculty development will be key to imbuing the campus culture with an interprofessional philosophy. Toward that goal, a faculty development workshop held in August identified teaching strategies and student learning opportunities—such as simulation, clinical experience or online education—through which to implement interprofessional education at SMU.

Also, because it will be necessary for students to work with physicians and others who represent healthcare specialties outside of SMU, the University is exploring partnerships with medical schools and other organizations to optimize their clinical experiences. In the meantime, efforts will be made to expand students’ opportunities
Members of the iPE committee (from left to right):

Nicole Christensen  
PHYSICAL THERAPY

Eric Stamps  
PODIATRY

Terry Nordstrom  
ACADEMIC AFFAIRS

Craig Elliott  
ENROLLMENT AND STUDENT SERVICES

Michael Negrete  
PHARMACY

Patricia Brennan  
NURSING

Members not included:  
Karen Wolf  
NURSING
The percentage of serious medical errors involving miscommunication between clinicians when patients are transferred or handed off.

80%

The percentage of patients with a chronic condition reporting that information on their diagnosis and treatment was not available when needed.

50%

The number of people who die every year in U.S. hospitals because of medical errors, attributed most often to communication failures.

98,000

Sources: Institute of Medicine and The Joint Commission
When Associate Professor Rolando Lazaro was selected for a prestigious Fulbright award this year to teach and study at the University of the Philippines (UP), he immediately considered how the experience could benefit his future work at Samuel Merritt University (SMU).

As a Fulbright scholar, Lazaro is closely observing community health delivery at UP’s internationally recognized rehabilitation program. Using the lessons he learns there, he intends to expand the pro bono Physical Therapy Neurologic Rehabilitation Clinic he started at SMU nine years ago into a multidisciplinary community health clinic.

“My goal is to make the clinic interprofessional so students in all SMU programs can participate,” said Lazaro, co-chair of the Department of Physical Therapy. The clinic serves people from SMU’s surrounding communities who suffer from conditions such as Parkinson’s disease or multiple sclerosis but do not have any insurance to cover the therapy they need.

Lazaro was inspired to apply for a Fulbright grant after spending two months as a volunteer teacher at the UP College of Allied Medical Professions (CAMP) in 2011, near the Manila suburb where he grew up. During that time, he witnessed similar healthcare disparities as we have in the United States.

“We’re such a rich country, but there’s such a big divide in our access to healthcare,” he said. “In the Philippines, most people gain access through limited public services. The community based rehabilitation program stretches their limited resources to provide as much as they can, and I want to learn how they’ve been successful at it.”

For five months, he also is teaching master’s level courses in global health, disability prevention and physical rehabilitation at the CAMP to help further its goal of increasing the number of faculty with post-baccalaureate degrees.

“It’s the country of my birth so it’s really a way to give back,” said Lazaro, who lived in the Philippines until moving to the United States 25 years ago.

Lazaro’s Fulbright award is the second received by a faculty member at SMU. In 1996–1997, Nursing Professor Richard MacIntyre served as a Fulbright scholar at the University of Tromsø in Norway.

“I am pleased that the J. William Fulbright Foreign Scholarship Board has recognized Professor Lazaro’s talents as a teacher and his deep concern for addressing health disparities,” said SMU President Sharon Diaz. “He exemplifies Samuel Merritt University’s mission of educating skilled, compassionate and culturally competent health-care professionals.”

The Fulbright Program, sponsored by the U.S. Department of State, enables U.S. citizens to study, teach, and conduct research in other countries. It also brings citizens of other countries to the United States, with the goal of establishing open communication and long-term cooperative relationships. The program chooses participants based on their academic merit and leadership potential, and provides them with the opportunity to observe one another’s political, economic and cultural institutions, exchange ideas, and embark on joint ventures of importance to people around the world.
for collaboration during clinical experiences and community service learning projects through work on cross-functional teams.

One plan focuses on developing an interprofessional curriculum on patient safety. Initially, students from at least three SMU programs will hone their ability to effectively participate on a cross-disciplinary team by engaging in a simulated learning experience as early as spring semester 2015 after completing required coursework. The simulation scenario will be based around a patient safety issue commonly encountered in clinical practice such as risk for infection, medication errors, or post-operative pain management.

In another initiative aimed at improving students’ ability to promote patient safety, SMU’s Health Sciences Simulation Center is launching a pilot project on error disclosure in a partnership with the Joint Medical Program (JMP) of the University of California at Berkeley to educate a combined group of pre-clerkship medical learners, undergraduate nursing students, graduate nursing students and students from other programs about how to best communicate healthcare mistakes to the healthcare team, patients and their families. Faculty from both institutions will work together on a new hybrid curriculum that will incorporate SMU expertise in simulation and JMP experience with student-directed, problem-based learning, unfolding in a series of half-day sessions during the 2013–14 academic year.

“In terms of accountability, patient outcomes and the elimination of errors, it is incumbent on us to practice healthcare in an interprofessional way,” says Nordstrom. “Therefore our students have to learn to provide patient-centered care that is safe and effective as a member of a team.”

Evidence shows that a team approach to the maintenance of health and the treatment of disease leads to better outcomes. Beginning in 1996, the Institute of Medicine (IOM) began issuing a series of reports demonstrating that team cooperation based on mutual respect and understanding leads to improved safety, patient outcomes and cost savings.

Professor Wolf, a member of the IPE steering committee, says that one of the challenges in the U.S. healthcare system until now has been that most healthcare workers don’t have a clear understanding of what each professional does and what they contribute to patient care. Traditionally, professionals from different disciplines often work together but make independent decisions about patient care.

“In this historically physician-led system, there’s been a lot of egoism around sharing power,” Wolf says. “Meanwhile, research has shown that 80 percent or more of errors occur because of miscommunication and lack of collaboration.”

Wolf said there is growing overlap among medical professions, particularly in the management of chronic diseases. For instance, a diabetic patient often requires the services of a physical therapist, a podiatrist, an optometrist, a nurse practitioner and a physician. “It takes a team to care for elders and people with complex conditions,” said Wolf.

As a result of the IPE plans underway at SMU, Nordstrom says students will be well-equipped to meet the needs of patients and their caregivers as the Affordable Care Act expands access to healthcare to more people.

“We want our students in every profession to know how they can collaborate to improve care for the most vulnerable people in our community,” says Nordstrom. “Our purpose is to create learning experiences for our students that prepare them for all of these aspects of interprofessional practice.”
Student Spotlight

Physical Therapy
Student Models Competence, Commitment and Compassion
When asked about their plans for the future, few graduate students talk about their community service goals. But Wendy Marrufo says that after she receives her doctorate in physical therapy from Samuel Merritt University next year, she wants to focus on helping young people from under-represented communities enter the healthcare profession.

Marrufo isn’t waiting until graduation to make positive contributions to public health. Over the past year she contacted community organizations about their volunteer needs, recruited some of her classmates, and organized several outreach projects that put what they are learning in the classroom to work.

“We’re all really busy in graduate school, but we still need to give back to the community,” Marrufo says.

The 29-year-old hardworking student also traveled on a medical mission in April to Panama, where SMU students, alumni and faculty members treated more than 500 people who traveled to the group’s makeshift clinic from rural towns that have little access to healthcare. “It was great to see how our small group from Samuel Merritt University could help so much,” says Marrufo.

Her sense of purpose explains why she received financial support for her studies from the David M. and Oolah B. Evans Endowed Physical Therapy Scholarship Fund and the Pradip and Rekha Choksi Endowed Occupational Therapy Scholarship Fund—awards granted to students based on their academic achievement and financial need as well as their active involvement in the community.

Marrufo’s desire to enlist more ethnic minority students to become healthcare professionals is a reflection of her own experience as a first-generation college and graduate student. Growing up in East Los Angeles, Marrufo recalls few resources for students who aspired to attend college. She had never even heard of what would become her college alma mater—Stanford University—until she was a high school junior. “I knew I was smart so I just tried really hard in everything that I did, sports and academics,” she recalls.

Marrufo’s parents, who emigrated from Mexico when they were teenagers, had little time to offer educational support to Marrufo and her five sisters. Her father worked long hours as a machinist and her mother juggled jobs at a garment factory in downtown Los Angeles and as a housecleaner.

“It was difficult for them to help us be successful in school,” she says. But that didn’t stop Marrufo. She attended Stanford, where she founded a sorority that focused on issues of concern to the Latino community.

Always athletic, Marrufo played rugby at Stanford until she suffered a serious knee injury. After surgery, she underwent physical therapy that enabled her to return to her active lifestyle. “It changed my life for the better,” she says.

After graduating with a bachelor’s degree in human biology, Marrufo became a personal trainer. But after a few years, she yearned to take better advantage of her intellect and to work with a more economically diverse population. She says she chose to study physical therapy at SMU over other schools because it offers more clinical hours and opportunities to work with patients. Among her most rewarding experiences since she started the Doctor of Physical Therapy (DPT) program in 2011 was participating in a free neuro clinic, where she was given six weeks to independently examine, evaluate, and develop a treatment plan for a stroke patient. She says the patient’s face lit up when her “non-functional” arm began to show improvement.

“I definitely felt like I had made a positive difference in her life, reminding me of the whole reason why I decided on a healthcare career.”

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**Total revenue deductions**

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**NET OPERATING REVENUE**

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**Net income/(Loss)**

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</tbody>
</table>

**Investment Activity in Restricted Funds**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Investment income</td>
<td>$1,345,000</td>
</tr>
<tr>
<td>Realized Gains/(Losses)</td>
<td>$1,084,000</td>
</tr>
<tr>
<td>Unrealized Gains/(Losses)</td>
<td>$4,890,000</td>
</tr>
</tbody>
</table>

**Total investment activity in restricted funds**

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$7,319,000</td>
</tr>
</tbody>
</table>
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Donna Barnes Nelson '67

NorCal Mutual Insurance Company
Dr. Paul R. Perchonock
Ada Lou Peterson
Carla Picchi
Joanna Picchi
Martha Picchi
Teresa E. Picchi '96 and Joel Linzer
Dr. George N. Quelely
Dr. Anthony S. Ravnik
Alejandro Rodriguez
Chris and Carla Ross
Dr. Joseph Ross
Robin Sandberg
Anne E. Scher
Dr. Lionel Schour
Dr. and Mrs. Wade Sherwood
John Garten-Shuman
Mr. and Mrs. Melvin Siegel
Dr. and Mrs. Jon Sigurdson
Mary Spear P'72
Mary B. Strauss
Mr. and Mrs. Stephen Taylor

Royal and Sue Valencia
Loretta Vanderveen
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Dr. and Mrs. Carl K. Watanabe
Dr. John C. Weaver, Jr.
Dr. and Mrs. Robert Weyand
Barbara Wiggin
Dr. Karen A. Wolf

PROFESSIONAL NURSES TRAINEESHIP GRANT
Department of Health and Human Service

PODIATRIC MEDICINE SCHOLARSHIP FUND
Dr. Penny Bamford
Dr. Daniel C. Barry '88
Dr. Jack Bois '80
In memory of Dr. Charles Pipkin '71
Dr. Theodore L. Deffinger '54
Dr. Ralph Erickson '85
Dr. Scot D. Foster
Dr. James P. Hatfield '75
Mr. and Mrs. William Horsfall
In memory of Dr. Robert Steven Sanday '65
Dr. Robert N. Mohr '76
Mr. and Mrs. Thomas E. Nuckols
In memory of Dr. Robert Steven Sanday '65
Evelyn Pohlmann
In memory of Dr. Robert Steven Sanday '65
Royce and Sue Valencia
Dr. Bennett Zier
Dr. Blake Zobell '91

JAMES W. PORTER SCHOLARSHIP FUND
Dr. Louis F. and Sharon C. Diaz

PROVIDENCE COLLEGE OF NURSING ALUMNI SCHOLARSHIP FUND
Sheila Maloney Bolin P'59
Karen Clowser Bruno P'60
Jayne Alexieff Bush P'62
Iris Tomasino French P'48
Floritta Petite Gray P'52
Anita J. Haigh P'47
Jovine Filer Hankins P'53
Kathy Castelan Hanson P'69
Donna Rucker Healy P'58
Nancy Kennedy Huarjardo P'62
Pamela Lampson McPherson P'70
Jane Alexander Marovich P'69
Marguerite Taylor Matala P'44
Carol Matthews Milano P'60
Mary Bruscher Rion P'56
Lorraine Molinaro Soik P'51
Katie M. Tom P'58
Betty Gibson Williams P'46

REGENTS DIVERSITY SCHOLARSHIP FUND
Irama Walker-Adame'
Anna Barnard '89
Jim and Stephanie Bangert
Brandy Beazley
Dr. Louis F. and Sharon C. Diaz
Juana Fuentes-Garcia
Dr. Sharon L. Gorman
Teresa Gwin

MARK K. REYNOLDS FUND FOR TECHNOLOGY AND ACADEMIC INSTRUCTION
Linda Abernathy
In honor of Holly Frazier
In memory of Mark K. Reynolds
Dr. Fusae K. Abbott
Jim and Stephanie Bangert
Mr. and Mrs. Walter A. Adams
In memory of Mark K. Reynolds
Amy Anderson
Kevin Archibald
Dr. Penny Bamford
Jim and Stephanie Bangert
Dr. Joan Bard
Anna Barnard '89
Robert A. Block
Tom and Gena Caya
In memory of
Joan Lorraine Justice-Brown

Marguerite Taylor Matala P'44
Dr. Terrence M. Nordstrom
Liza Osoto
Dr. Kathleen Roberts
Alejandro Rodriguez
Chris and Carla Ross
Anglyn S. Sasser
Dr. and Mrs. John E. Swartzberg
Royce and Sue Valencia
In memory of Catherine Slattery Roberts
Tarika Witherspoon
Karen Wolf
Eileen Yee

HAROLD M. “MAC” REYNOLDS SCHOLARSHIP FUND
Drs. Luis F. and Sharon C. Diaz

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Edward “Ted” Curran  
Drs. Luis F. and Sharon C. Diaz  
Marcella J. Edzards  
In memory of  
Mark K. Reynolds  
Dr. Craig M. Elliott, II  
Dr. Sylvia Fox  
Holly Frazier  
Adelina Gage-Kelly  
Ronda Garrett  
Dr. Sharon L. Gorman  
Rodette Green  
In honor of Holly Frazier  
In memory of  
Mark K. Reynolds  
Steve and Peggy Griffith  
Mr. and Mrs. Dan Hamilton  
Mary Diane Hansen  
In memory of  
Catherine Slattery Roberts  
Lillian Lugo-Harvin  
Dr. Abby Heydman  
In memory of  
Mark K. Reynolds  
Jamie S. Hirota  
In memory of  
Mark K. Reynolds  
Mary Hoang  
Sharon Chin Hom  
Valerie Landau  
Dr. Rolando T. Lazaro  
Winston H. Lee  
Dr. Mileva Saulo-Lewis  
Yurismary Llerena  
Dr. Pamela Minarik  
Liza Osoteo  
Barbara Piepho  
In memory of  
Mark K. Reynolds  
Mr. and Mrs. Eddie Polk  
In honor of Holly Frazier  
In memory of  
Mark K. Reynolds  
Donna L. Pryor  
In honor of Holly Frazier  
In memory of  
Mark K. Reynolds  
Dr. Rhonda Ramirez ’96  
Dr. Richard Rocco  
Alejandro Rodriguez  
Maria Ronquillo  
Chris and Carla Ross  
In memory of  
Joan Lorraine Justice-Brown  
In memory of  
Jacqueline Peter’s father  
In memory of  
Mark K. Reynolds  
Dr. and Mrs. P.G. Russell  
Mary Salas  
Blair Simmons  
Sydney Simon  
Hai-Thom Sota  
Julie Staggs  
Dr. Eric D. Stamps ’93  
Markus Thomas  
Royce and Sue Valencia  
In memory of  
Mark K. Reynolds  
Marcus D. Walton  
Tarika Witherspoon  
Karen Wolf  
Jeanette Wong  
Dr. Bennett G. Zier  
In memory of  
Mark K. Reynolds  

MARY E. ROBINSON ENDOVED SCHOLARSHIP FUND  
Dr. Fusae K. Abbott  
Irmata Walkert-Adamé’  
Amy Anderson  
Kevin Archibald  
Dr. Penny Bamford  
Jim and Stephanie Bangert  
Anna Barnard ’89  
Tami Bechtle  
Josh Campbell  
Tom and Gena Caya  
Elizabeth Cook  
Dr. Cecily D. Cosby  
Drs. Luis F. and Sharon C. Diaz  
Dr. Valerie Dzubur  
Dr. Craig M. Elliott, II  
Jill Emerson  
Alyssa Erikson  
Ronda Garrett  
Mary Grefal  
Tanya M. Grigg  
Marjorie Hammer  
Corine Harris  
Pam Harrison  
Lillian Lugo-Harvin  
Jamie S. Hirota  
Mary Hoang  
Kristi Kindberg  
Roman Kutu ’03  
Marie Ma  
Adriane Madden  
Lily Marquez  
Elizabeth Mayo  
Liza Osoteo  
Margaret Peterson  
Karena Reinhardt  
Mark K. Reynolds  
Dr. Rhonda Ramirez ’96  
Alejandro Rodriguez  
Chris and Carla Ross  
Saeng Saephan  
Maria Salas  
Ronald Salazar  
Anne Scher  
Dr. Suzanne August  
John Garten-Shuman  
Blair Simmons  
Dr. Eric Stamps ’93  
Royce and Sue Valencia  
Tarika Witherspoon  
Eileen S. Yee  

JERI E. RYAN SCHOLARSHIP FUND  
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Paul L. Davies, Jr.  
Charlotte A. Deutsch  
Drs. Luis F. and Sharon C. Diaz  
Ruth P. Dumond  
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Dr. Abby Heydman  
Nancy Hopkins  
Dr. Matilda Ignacio  
Dennis Kilbane  
Bernard Makowsky  
Laura Davies Mateo  
Kathleen Kilbane Thompson  
Verna L. Wilson  

SCHOLARS IN SERVICE SCHOLARSHIP FUND  
Che Abram  
Kira Lynne Allen  
Corine Harris  
Kathryne J. Henderson  
Hai-Thom Sota  

SCHOLARSHIPS FOR DISADVANTAGED STUDENTS  
Department of Health and Human Service  

SENIOR STUDENT TEACHING ASSISTANT PROGRAM  
Kaiser Foundation Health Plan, Inc.  

R. SHAPIRO FAMILY FOUNDATION ENDOVED PHYSICAL THERAPY SCHOLARSHIP FUND  
R. Shapiro Family Foundation  

Left to right: JUDY RASMUSSEN SCHAB, ’63, BARBARA PARSONS ROGIE, ’63, KATHRYN KILLEBREW, ’63 and JACKIE BUEHRER COVEY.
PETER D. AND JENNIE LIM SHIU ENDOWED MEMORIAL SCHOLARSHIP FUND
May C. Lim
In memory of
Harry Hin Chang
In memory of
Nellie Fumiko Takeda
Barbara Sheng
In honor of Jennie Lim Shiu

Marilyn Snider Nursing Scholarship Fund
Drs. Luis F. and Sharon C. Diaz
Mr. and Mrs. Lee Snider

Southeast Asia Medical Mission Fund
D.J. Agnew
Black Rock Arts Foundation
Mr. and Mrs. A.W. Brown
Charles Schwab Foundation
Diane Chui
Stuart Davis
John P. Dawson
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Katherine K. Morris
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Palo Alto Laser & Skin Care, Inc.
Mr. and Mrs. Jeffrey L. Raty
John Siebel
Justin J. Tansuwan
Michael Tedesco
Wells Fargo Bank

Mark A. Swift, Jr. Memorial Scholarship Fund
Drs. Luis F. and Sharon C. Diaz
Darlene DeLancey and Robert Windman
In honor of Alan and Connie Gazaway

Tracey Teruya Memorial Physical Therapy Fund
Quinn Orthopedic Physical Therapy

Tiburcio Vasquez Health Center Project Fund
Kristen Barriere
Ana Berrios
Martha Cain
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Laura Rombach
Jonathan Van Nuys
Linda Virgen

Transgender Project Fund
East Bay AIDS Center

Tavi M. Van Ogle ’88 Endowed Nursing Scholarship Fund
Drs. Luis F. and Sharon C. Diaz
Chris and Carla Ross
Frederick D. Van Ogle

Dr. Patricia Harvey Webb Scholarship Fund
Dr. Fusae K. Abbott
Dr. Joan Bard
Dr. Audrey Berman
In memory of Joan Lorraine Justice-Brown
In memory of Betty and Carl Bubeck
In memory of Anthony Camareno
In honor of the birth of Makena Jean Gaeddert

In memory of Sonja Kirton
In memory of Willie Doris McCants
In memory of Donald C. MacIntyre
In honor of the birth of Koa Edward MacIntyre
In honor of birth of Andrea and Neal Shaboshow’s granddaughter
Kora Elizabeth Krahm
In memory of Janet Mekonnen’s sister
In memory of Charles Orme, Jr.
In memory of Jacqueline Peter’s father
In memory of Mark K. Reynolds
In memory of Catherine Slattery Roberts
In honor of Ken and Arlene Sargent’s grandson, Lucas

Susan M. Cantrell
Rene Clymer-Engelhart
Gail DeBoer
Drs. Luis F. and Sharon C. Diaz
Dr. Sylvia Fox
Dr. Teresa Gwin
Dr. Nancy Haugen
Adelina Gage-Kelly
Dr. Patricia Kuster
Dr. Pamela Minarik
Mindy Prestia ’98
Chris and Carla Ross
Janet W. Rowland ’03
Royce and Sue Valencia
Karen Wolf

Juanita Hanan Wilson Endowed Memorial Nursing Scholarship Fund
Anna Barnard ’89
Tom and Gena Caya
Mr. and Mrs. Kevin Greene
Mary Diane Hansen
Valerie Landau
Elisa Rea
Chris and Carla Ross
Elena Sanchez
Anne E. Seed
Chi Kwan Shea
Royce and Sue Valencia

Dr. William & Doreen Wong Podiatric Medicine Endowed Scholarship Fund
Drs. Luis F. and Sharon C. Diaz

Katie Tom, 1958 Providence College of Nursing alum with her guest Jackie Giacolletti.
PRINCIPLES OF COMMUNITY

Samuel Merritt University is committed to creating a diverse, equitable, and inclusive learning community, workplace, and campus environment. We demonstrate this commitment by ensuring that SMU is a community where:

✈ We affirm the value of human diversity, respecting our differences, while acknowledging our common humanity.

✈ We affirm the inherent dignity and value of every person and strive to maintain a climate based on mutual respect, fairness, and inclusion, calling for civility and decency in our personal interactions, regardless of position or status in the academy.

✈ We respect the right of freedom of expression within our community and value the different perspectives of others; recognizing and appreciating these differences builds trust and contributes to the excellence of the University.

✈ We challenge all forms of behavior that are prejudicial, discriminatory, and detrimental or contrary to these values; and we take responsibility for increasing our own understanding of these issues through education and our interactions with one another.

As a community, we are committed, individually and collectively, to embodying and safeguarding these principles.