INVESTING in the FUTURE

MEDICAL SCHOLARSHIPS FOR THE UAB MONTGOMERY REGIONAL MEDICAL CAMPUS
For more than 40 years, the School of Medicine at UAB has enjoyed a dynamic resident education partnership with the Montgomery medical community. In 2014, we began offering comprehensive medical education in Montgomery when the first group of third-year UAB medical students started training at the new Montgomery Regional Campus of the UAB School of Medicine. This collaborative effort among UAB, Baptist Health, and the city of Montgomery is a key element of UAB’s strategic plan to stem a shortage of physicians in underserved, rural areas around the state and to increase the ranks of primary care physicians in Alabama. Montgomery is the third regional campus for the School of Medicine, joining campuses in Huntsville and Tuscaloosa.

Most states are dealing with a shortage of physicians, but the need for primary care physicians is especially acute in Alabama. “There is a dearth of primary care physicians in the River Region of central Alabama, and the average age of doctors is over 50,” says Wickliffe J. Many Jr., M.D., the former internal medicine residency director who now serves as regional dean of the Montgomery Regional Campus.

The program launched in May 2014 with five third-year medical students, and in 2015 the incoming class size is expected to expand to 18. Students at the Montgomery Regional Campus utilize facilities at Baptist Medical Center South, the longtime home of the UAB Montgomery Internal Medicine Residency Program. The campus’s 2014 debut marked 45 years since Tinsley R. Harrison, M.D., and J.J. “Jack” Kirschenfeld, M.D., brought the first UAB medical students to Montgomery for rounds at local hospitals.
Not only will the Montgomery Regional Campus improve health care access in central Alabama, it is expected to have a significant economic effect as well. Montgomery Mayor Todd Strange told the Montgomery Business Journal (MBJ), “This is a dream come true for us,” adding that bringing third- and fourth-year medical students to Montgomery “answered a prayer.”

“Having a medical school in Montgomery is the equivalent of landing a major new industry,” said Lee Ellis, former chairman of the Montgomery Area Chamber of Commerce Board of Directors.

It is hoped that studying in Montgomery will allow residents to establish roots, which will encourage them to stay in the region when they launch their medical careers. According to the MBJ, a one-doctor office has an economic impact of at least $1 million a year. That one-doctor office typically has four employees and the physician spends money on supplies and services, pays taxes, and buys a house.

More importantly, residents who stay in the River Region to practice medicine will help ease the problem of Alabama’s aging physician base. According to Russell Tyner, president and CEO of Baptist Health, “Communities that are not manufacturing physicians in the future won’t have physicians.”

Doctors tend to practice where they train:

- 44 percent of UAB medical students stay in Alabama for their residencies
- 57 percent of graduates from regional campuses stay in Alabama to practice
- 30 percent of graduates from regional campuses practice primary care in the state

Medical Education in Montgomery

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
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<tbody>
<tr>
<td>1968</td>
<td>First UAB medical students begin rounds at Montgomery hospitals</td>
</tr>
<tr>
<td>1974</td>
<td>Montgomery Internal Medicine Residency Program established</td>
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<tr>
<td>1978</td>
<td>Montgomery Internal Medicine Residency Program becomes part of UAB</td>
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<tr>
<td>1997</td>
<td>Montgomery Family Medicine Residency Program established</td>
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<tr>
<td>2007</td>
<td>UAB Emergency Medicine residents at BMC South</td>
</tr>
<tr>
<td>2014</td>
<td>First group of UAB medical students begins training at Montgomery Regional Campus</td>
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The economic impact of a one-doctor office is at least $1 million.

Primary Care in Alabama
3,230 primary care physicians
68.3 physicians per 100,000 people
45th in the nation

River Region Aging Physician Workforce
2011
- General Medicine:
  - Average Age: 48
  - Ages 55-60: 16%
  - Over age 60: 10%
- General Surgery:
  - Average Age: 57
  - Ages 55-60: 30%
  - Over age 60: 35%

2016
- General Medicine:
  - Average Age: 53
  - Ages 55-60: 18%
  - Over age 60: 24%
- General Surgery:
  - Average Age: 62
  - Ages 55-60: 13%
  - Over age 60: 61%

Medical School Tuition
- $29,000 per year [In-State] *average tuition and fees
- $62,000 per year [Out-of-State] *average tuition

The average medical student graduates with at least $180,000 in debt.
The UAB School of Medicine is stepping in to help solve Alabama’s primary care crisis. According to Selwyn M. Vickers, M.D., FACS, senior vice president for medicine and dean of the School of Medicine, the Montgomery Campus “represents an important component and priority of our primary care strategic plan and will have a major impact on health-care delivery in central Alabama.” We are seeking visionary philanthropic partners to help us in our effort to recruit and retain promising young medical students for the new Montgomery Regional Campus by providing scholarships to help ease their debt burden.

The increasing cost of providing our best and brightest students with a top-caliber medical education means tuition can become a major burden. This debt load—averaging $180,000 for graduating medical students—not only can make the medical school years difficult, but can influence a student’s choice of the medicine he or she will practice. A young person who feels called to primary care may nevertheless choose a specialty in which the pay is higher when faced with mounting student debt, thus contributing to the already critical shortage of primary care physicians across Alabama.

Your support through scholarship contributions can have a positive impact on the future of these promising medical students and on the quality of health care throughout the region. With your help, even more talented students can realize their dreams by focusing on their studies and clinical experiences rather than on their student debt.

One of the prongs of the overall primary care strategy is the Primary Care Scholars Program, designed by William A. Curry, M.D., a former community physician who now is professor of General Internal Medicine and associate dean for Primary Care and Rural Health in the School of Medicine and senior vice president for Population Health in the UAB Health System.

The merit-based program provides an annual scholarship of $10,000, mentoring, career modeling, and academic opportunities such as summer workshops and a summer immersion program where students work in a clinical setting.

“The program was created to foster and encourage the students to maintain interest in primary care—family medicine, internal medicine, pediatrics, and a combination of adult and pediatric medicine—throughout their four years in medical school,” says B. Earl Salser Jr., M.D., associate professor in the Department of Family and Community Medicine and director of the Primary Care Scholars Program. Learn more about giving to the Primary Care Scholars Program at www.uab.edu/PCScholarship.
SCHOLARSHIP TYPES

There are three main types of scholarships:

- **Endowed Scholarships** - exist in perpetuity; funds are invested and a portion of earnings is used to fund an annual award.

  The minimum threshold needed to endow a scholarship at UAB is $25,000, which can be made as a single gift or several combined gifts, as a pledge of up to five years, or as a part of an estate plan. The funds are professionally invested through the University of Alabama Pooled Endowment Fund, and a portion of the income is made available to fund the scholarship according to a spending rate—typically 5 percent—established and annually reviewed by the University of Alabama Board of Trustees. Annual reports are issued on the endowment status.

  An endowed scholarship at the $25,000 level generally produces $1,250 in scholarship dollars to be awarded, which currently pays for about 5 percent of one student’s in-state tuition. Though any support is appreciated, the School of Medicine’s ultimate goal is to have scholarship endowments funded at higher levels.

  When the minimum threshold of $25,000 is received for an endowed scholarship, a resolution formally establishing the scholarship is sent to the University of Alabama Board of Trustees for approval. Additional gifts can be made to the scholarship in the future, creating further opportunities for deserving students.

- **Sponsored Scholarships** - current-use funds are spent outright each year to support a student.

- **Combination Current-Use and Endowed Scholarships** - a portion of the gift is used to award a scholarship now and the remainder is used to establish or augment an endowed scholarship. For example, a donor wishing to establish an endowed scholarship of $100,000 might choose to give $25,000 each year for five years, with $20,000 used to build endowment and $5,000 awarded outright to a current student. This enables the donor to achieve the long-term goal and also enjoy the immediate rewards of supporting a student in the present.

**Double Your Impact**

Gifts from School of Medicine alumni to current-use scholarships will be matched dollar for dollar by the School up to $150,000 through September 30, 2015.
WAYS TO FUND SCHOLARSHIPS

Whether endowed, sponsored, or a combination of the two, scholarships can be funded in several ways, or through a combination of these methods:

- Gifts or pledges of cash (pledges can be spread over five years)
- Planned gifts offer significant tax and estate benefits to the donor and his or her heirs. They create a lasting impact after one’s lifetime and establish a legacy for the donor or donor’s loved one. Planned gift examples include:
  
  **Bequests ~ Beneficiary Designations (life insurance or retirement plan assets)**
  **Charitable IRA Rollover ~ Appreciated Stocks/Securities ~ Donor Advised Funds**
  **Charitable Gift Annuities ~ Charitable Lead Trusts/Charitable Remainder Trusts**

Gifts are typically made directly to the School of Medicine. However, donors may choose to make their gifts through the University of Alabama Medical Alumni Association. If the gift is for endowment, or involves a charitable trust or gift annuity rather than a simple bequest, the SOM Development Office can assist in determining the best way to accomplish the donor’s goals. All gifts to School of Medicine scholarships are tax-deductible to the extent allowed by law.

SCHOLARSHIP RECIPIENT CONSIDERATIONS

It is recommended that scholarship criteria for an endowment agreement be as flexible as possible to allow for maximum benefit to the greatest number of students, no matter the changes that may occur to tuition and program structure in the future. While final selection decisions are made by the School of Medicine Scholarship Committee, donors may express preference for how their scholarships will be used. Establishing preference is not required, as more students may benefit when criteria remain flexible.

Examples of recipient criteria considerations include:

- A donor may specify that the scholarship be either need- or merit-based, or may choose to leave that decision to the School of Medicine scholarship committee.
- A donor may wish to support students who plan to pursue primary care, keeping in mind that students often make that choice in their third or even fourth years of medical school.
- Some donors wish to give preference to students from a particular region of Alabama, or to those who are the first generation of their family to attend college or medical school.

Each time the scholarship is awarded, the donor or his or her designee will receive information about the student recipient’s progress toward the goal of a career in medicine. Additional gifts can be made to the scholarship at any time in the future, creating more opportunities for deserving students.
To learn more about scholarships at the UAB School of Medicine, or if you would like to discuss the many ways you can give to support our Montgomery Campus students, please contact:

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Mailing Address:  
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1720 Second Avenue South  
Birmingham, AL 35294-3412

“Because of scholarship support, I have been able to make the dream of a medical education a reality without the hardship of financial debt. I am now in my third-year of medical school, and I continue to be challenged every day. I believe I am receiving the best training a medical student can get, and with your support I can continue my journey to become a doctor.”

~ Justin Malek, UAB School of Medicine Class of 2016 and member of the inaugural class at the UAB Montgomery Regional Campus

“Making a scholarship gift to the Montgomery Regional Medical Campus allows me to support both my alma mater’s mission of providing top-notch medical education as well as aspiring physicians who are the future of medicine, all while keeping the gift’s impact focused on the Montgomery area.”

~ Dr. Arthur M. Britton, retired OB/GYN, SOM alumnus, and Montgomery campus scholarship donor

“My father completed his neurology residency at UAB and always spoke of the school with such high esteem and respect, that it became a goal of mine to attend UAB. As part of the second group of medical students in Montgomery, I hope to set the bar high and create a legacy that will make the Montgomery campus the best regional campus in the state.”

~ Jessica Epperson, Class of 2017, member of the second class at the UAB Montgomery Regional Campus, and second-generation School of Medicine student

To watch a video of current School of Medicine Scholarship recipients discussing the importance of scholarships to fulfilling their dreams, scan the QR code at left with a smartphone QR code-reader app.