

2023 Community Investment Annual Report



A Message from Robert E. White, Jr.



Robert E. White, Jr.

*President,
The Doctors Company
and TDC Group*

At TDC Group, we strive to provide best imaginable service to our healthcare clients. But it goes further: Our employees carry this mantra with them, providing best imaginable service to their communities in the form of volunteering and making financial contributions to charitable organizations. In addition to the nonprofits they support at home, employees stepped up to provide humanitarian aid to those affected by the unprecedented wildfires in Maui and other areas impacted by natural disasters or instability. TDC Group was proud to support their efforts by matching their donations and volunteer hours. In 2023, we introduced new giving campaigns to increase employee impact and the impact of our Corporate Charitable Giving program that supports organizations addressing the social determinants of health. The Doctors Company Foundation approved funding for six new projects focused on patient safety research and education, continuing to advance the practice of good medicine and improve clinical outcomes across the healthcare community.

I am pleased to share with you our *2023 Community Investment Report*.

2023 TDC Group Community Investment Programs

Employee Gift Matching

655

employee matching requests granted

1,670

matched volunteer hours

372

nonprofit organization recipients

Corporate Charitable Giving

80

organizations receiving corporate charitable giving contributions

The Doctors Company Foundation Grants

\$7.98M

in grant funding to date

Cover photo: H.O.M.E.'s intergenerational housing is based on the idea that seniors should not be segregated from other generations and that people of all ages benefit from connecting with one another in daily life.

Why We Give

2023 TDC Group Giving Campaigns



Elizabeth Y. Healy

*Vice President, Government
and Community Relations,
The Doctors Company*

Every day, our members deal with the impacts of the social determinants of health—the non-medical factors that influence health outcomes—on their patients and their community. We know that factors such as poverty, unequal access to education and employment, lack of safe housing and transportation, and discrimination can have a great influence on health and impede access to healthcare.

That is why TDC Group operates two major giving programs that fulfill an important part of our mission to advance, protect, and reward the practice of good medicine by addressing these needs. **Together, these programs not only reflect and support what our members value, but empower our employees in their own communities and unite them in a common goal.**

The **Corporate Charitable Giving program** supports nonprofit organizations' efforts to address community needs through charitable investments. The **Employee Gift Matching program** supports our employees' own charitable giving, matching their financial donations and volunteer hours to eligible nonprofit organizations of their choosing each year.

Together, we can make a difference—and we do. You'll see in the many stories within this report that these two giving programs allow us to be responsive to community needs and reflect our members' and employees' values and concerns.

For me, they are the most joyous parts of the work we do.

Why We Give

2023 TDC Group Giving Campaigns (continued)

In 2023, we hosted four campaigns to highlight ways employees could participate and multiply their impact in their communities.

April Volunteer Campaign

While many employees volunteer their time with nonprofit organizations, not all have applied for the volunteer matching program, so we used National Volunteer Month as a time to encourage more employees to take year-round advantage of the match. We reduced the number of volunteer hours required for a match—whether cooking and serving meals for seniors, serving on a board, or helping at a fundraiser—and the number of employees who participated increased by 30 percent.

STEPtember Challenge

The STEPtember health and wellness team-building challenge supported Cerebral Palsy Alliance Research Foundation. In many fundraising activities, participants have to be in the same place at the same time, but with STEPtember, employees across the country can take part on their own schedule. TDC Group provided a corporate sponsorship and participants tracked their activity—whether walking, wheelchair basketball, yoga, physical therapy, or some other movement—online, which was then converted to “steps” for the group effort. It was a great way to work together for a common goal while investing in our own well-being.

October Double-Match Challenge

Our Double-Match Challenge adds another level of support to the programs and communities our team members care about. For each charitable donation employees made during the month of October, the company double-matched the amount, thereby tripling the total amount donated to the employee’s organization of choice. Our first October Double-Match Challenge in 2022 brought in nine times as many donors, so to expand on the success, we increased the maximum amount TDC Group would double match in 2023.

November/December Campaign to Alleviate Food Insecurity

When we talk about the social determinants of health, it doesn’t get any more basic than food. To have health and well-being, we have to be able to nourish ourselves and our families—and the effects of food insecurity can be long term: Research has shown that those who experience food insecurity when they are young are more likely to experience worse health outcomes throughout their lives. Monetary donations can support food banks beyond the holiday season and gives them flexibility to obtain fresh food and staples all year long. So TDC Group not only supported organizations fighting food insecurity through its Corporate Charitable Giving and Employee Gift Matching programs, it also added an additional \$50 to each of these gift matches during this campaign.

Employee Gift Matching Program

The employees of TDC Group—The Doctors Company, Healthcare Risk Advisors, TDC Specialty Underwriters, and Medical Advantage—have consistently demonstrated their generosity to the causes they care most about, and our Community Investment program is designed to reflect their values and amplify their impact on the social determinants of health in their own communities. The extent of the Employee Gift Matching program is unusually broad, encouraging employees to support nonprofit organizations of their own choosing, then matching their charitable giving both in terms of employees’ financial donations and their volunteer hours.

In 2023, TDC Group matched 655 employee donations and 1670 volunteer hours (a 30 percent increase in volunteer participation) to 372 organizations. On the following pages, some of our employees share their stories—see how they are making a difference.

October Double-Match Challenge: Tripling the Impact

For the second consecutive year, TDC Group offered to match employee’s charitable donations at 200 percent to their choice of nonprofit organizations, instead of the regular 100 percent match, during the month of October. However, this time with an increased limit of \$1,000, compared to \$150 in 2022. That means a contribution of up to \$1,000 from an employee will be matched with up to \$2,000 by TDC Group, so the nonprofit organization would potentially receive a total of \$3,000. While 2022’s October Double-Match resulted in an impressive total of nearly \$75,000 in charitable contributions from TDC Group and employees, the 2023’s Double-Match Challenge netted more than \$133,000 for 141 nonprofit organizations.

Here’s What Employees Say About The Program

“Yes, I donated more than I normally would in order to maximize the double match.”

“This is a really great program and I’m sad I didn’t realize how easy it was sooner.”

“I feel fortunate to work in a company that understands the importance and impact matching has! I give more than I would typically give because I know my money goes further with the double match.”

“Grateful that TDC Group has this program because it allows employees to donate to their favorite charities.”

“This is an amazing program and I am so happy to see TDC Group do this. It makes me very proud to work for the company and make a difference in my community. Please continue to do this in future years.”

“I would have made the donation regardless of the double match, but it was a reason why I donated more than I would have.”

Employee Gift Matching Program

Debra Davidson, MJ, ARM, CPHRM, CPPS, Senior Patient Safety Risk Manager, The Doctors Company

I learned about WomenHeart the hard way—after having a heart attack in my 40s. I work with doctors day in and day out, but still I dismissed the symptoms I was having until a walk-in clinic sent me to the ER. Sure enough, I had had a heart attack, and it required two stents.

WomenHeart is the leading voice for the millions of American women living with or at risk of heart disease. It's the only national patient-centered organization that focuses exclusively on women's heart disease, advocating for research and clinical trials and offering education and support. I was approached by a WomenHeart representative while I was in the hospital and was invited to take part in a clinical trial, which I did. I stayed connected after that because I thought: If I didn't have heart disease on my radar, I'm sure other women don't either. I had no idea it was the No. 1 killer for women.



Debra's outstanding service and contributions were recognized by the Rush Heart Center for Women, the Oak Park WomenHeart group her volunteer work supports.

Since then, I've served as a speaker sharing my story, and I host a monthly support group. The group is for those newly diagnosed and struggling to deal with their "new normal" or those who aren't getting the information they need. I'm fortunate to have nationally recognized cardiologist Annabelle Volgman, MD, who founded the Rush Heart Center for Women in Chicago—one of the only women-focused cardiac centers in the U.S.—as a liaison for my group.

The Doctors Company is incredibly generous in donating funds to WomenHeart for my volunteer hours. WomenHeart has a very small staff and relies heavily on volunteers, so the funds are designated for supplies and educational resources for the support group I run. I'm incredibly appreciative for that, because I wouldn't be able to do what I do for these women at such a critical time in their lives without The Doctors Company's support.



Debra next to Dr. Annabelle Volgman at the Rush Heart Center for Women 20th-Year Anniversary Celebration.

Employee Gift Matching Program

Chenelle Hunter, Intermediate Accountant, Finance, The Doctors Company

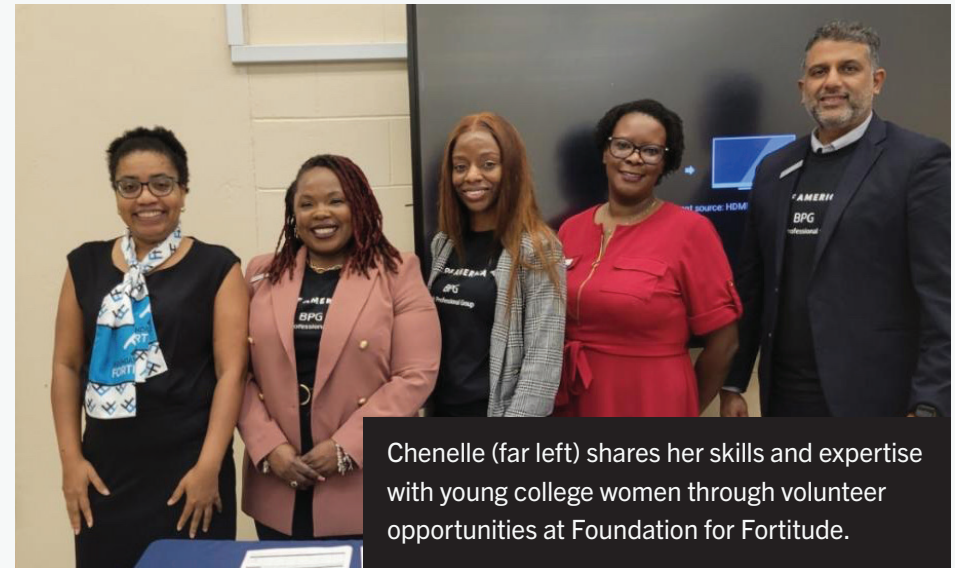
I've taken advantage of the Employee Gift Matching program since I joined The Doctors Company, but 2023 was the first year I took advantage of maximizing the October double-match contribution limit.

The double match offers the power to maximize giving to organizations that mean a great deal to me, and I love that! These are the organizations I support through the gift matching program:

Foundation for Fortitude, which educates, encourages, and empowers young women enrolled at Edward Waters University, many of whom are first-generation college students. The organization offers financial scholarships, mentoring and networking, and personal and professional development workshops, and requires that participants perform community service so they experience the potential impact they could have in the community.

The **Ronald McDonald House Charities of Jacksonville** has always been in my heart. The organization serves families from across the U.S. and abroad, providing young patients and their families transportation to and from appointments, meals, and a temporary place to call home when in Jacksonville for medical treatment. This allows the families to focus on the children receiving the care they need.

Edward Waters University, my alma mater, is Florida's first independent institution of higher learning established for educating



African Americans and is also Florida's first Historically Black College and University (HBCU).

I track my volunteer hours and donations through the Employee Gift Matching program and am already planning for this October's Double-Match Challenge. I look at it this way: maybe time to volunteer isn't available, but giving financially is always an option, and the more funding available, the more people organizations can serve.

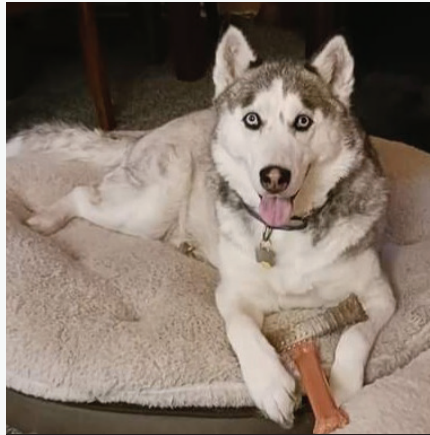
The Employee Gift Matching program makes me proud to be a part of this company.

Employee Gift Matching Program

Dena Allen, Senior Consultant, Analytics, Medical Advantage

I have owned—and been owned by—huskies for 30 years. They are not a breed for everyone, but they are the breed for me. After the passings of my first two sets of huskies over several years, I knew I wanted another husky or two. In my search, I came across the Hairy Houdini Siberian Husky Rescue, which is named for the fact that huskies are hairy and known escape artists.

The **Hairy Houdini Siberian Husky Rescue (HSHSR)** is a home-based foster program in Michigan for huskies and husky mixes. Last year alone, they had more than 1,000 email requests for help with abused, injured, and abandoned dogs. Volunteers foster the dogs, and the rescue takes care of medical/health issues and routine care, spaying/neutering, and microchipping. With the right care, these dogs thrive and are adopted through a rigorous screening and matching process. We also have specially trained volunteers who provide sanctuary kennels for feral dogs to live and play comfortably without human contact.



Lilo was left at a veterinary clinic just before her 1st birthday. The vet contacted HSHSR from where Dena adopted her and she is now 6½ years old.

I've been supporting the organization since 2018, providing dog transport, volunteering at pet expos, and making crafts for the rescue's fundraisers. Through them I've been adopted by two more huskies, Lilo and Romeo.

The Doctors Company Employee Gift Matching program has been a godsend: I've made sure to get the full match for the last few years, and I was all over the double match, too. The rescue was just in awe that The Doctors Company double-matched my October donation and was so appreciative because every penny counts.

I think the Employee Gift Matching program is amazing. I've worked for organizations that give back, but I like that The Doctors Company supports what we choose to support. It's incredibly generous and both the Hairy Houdini Siberian Husky Rescue and I are very appreciative for their generous support.



Romeo suffered a broken front leg at 9 months of age. Unable to afford surgery, the owner chose euthanasia, so the vet contacted HSHSR who underwrote treatment. Dena adopted Romeo in 2018.

Employee Gift Matching Program

Jeff McDonald, CPCU, ARM, Executive Vice President, TDC Specialty Underwriters

One of my beneficiaries, **St. Baldrick's Foundation**, is in its 25th year and is hoping to return to their pre-pandemic level of fundraising for pediatric cancer research. Participants climb into the barber's chair for a head shave and invite their family, friends, coworkers, and community members to chip in to fund research dedicated to



Jeff McDonald and his family at the St. Baldrick's event in Downtown Chicago.

improving children's survival odds and finding faster, less painful methods of treatment. In 2023, my goal was to raise \$25,000. I worked with the TDC Group Community Investment team to create prepopulated forms so that coworkers could easily donate and take advantage of the Employee Gift Matching program when I asked them to support my "haircut." Thanks to the support of my colleagues at TDC Specialty Underwriters and the employee gift matching, we raised \$28,750.

My other designated beneficiary is **Housing Opportunities and Maintenance for the Elderly (H.O.M.E.)**, which I've supported through the Employee Gift Matching program every year since I joined the company. H.O.M.E. provides free and low-cost repairs for low-income seniors in and around Chicago, plus a shopping bus and other assistance from caring volunteers. They also create supportive, assistive communities through intergenerational housing.

Five years ago, realizing that H.O.M.E. very closely fits the profile for our Corporate Charitable Giving program, I asked TDC Group to consider sponsoring a table at their annual gala. They've now done so every year, making us a major donor to this program.

I might get a little competitive when it comes to fundraising, but when you're competing for charities, everybody wins.

Corporate Charitable Giving Program

In addition to supporting employee contributions, TDC Group also invests in communities through its Corporate Charitable Giving program. This program supports local nonprofits focused on reducing inequities, improving access to services, and building community health, well-being, and resilience, as well as national organizations committed to creating environments that promote good health for all.

The common denominator among all organizations is that they address elements within the domains of the social determinants of health: a wide range of environmental conditions that affect health, functioning, and quality of life. As these are complex and often inter-related issues, the reach of many of these organizations goes beyond one domain, tackling multiple conditions to improve health and reduce health disparities.

In 2023, after a 25 percent increase for 2022, TDC Group again increased its corporate charitable budget by another 25 percent, allowing us to support 80 organizations—20 more than last year.

SOCIAL DETERMINANTS OF HEALTH



Economic Stability



Education Access
and Quality



Health Care Access
and Quality



Neighborhood and
Built Environment



Social and
Community Context

Corporate Charitable Giving Program

Fair Housing Napa Valley (Napa, California)

Fair Housing Napa Valley (FHNV) fosters fair and equal housing opportunities for all, aiming to eliminate housing discrimination and provide crucial assistance to both tenants and landlords.



As the sole agency of its kind in Napa, FHNV focuses its services on supporting low-income tenants and the most vulnerable members of our community.

With the increasing challenges of housing security and eviction risks, FHNV has become a vital resource. In the past year alone, it has assisted more than 700 tenant households and nearly 1,800 Napa residents with various housing-related needs.

“Fair Housing Napa Valley believes in advocating for the fundamental need for shelter,” said Maria Cisneros, a director on the FHNV Board. “We promote a healthy living environment that is not just a home, but a sanctuary where students can study; and ensuring the privilege of residing in the same community where one works, fostering a sense of belonging and allowing families to live in proximity to their children’s schools.”

“FHNV is committed to equal housing choice and to eliminating housing discrimination, particularly for Napa’s most vulnerable residents. Discrimination and related housing disparities, including the growing threat of housing insecurity, have broad-reaching impacts on the physical and mental health of all residents. Housing is healthcare. FHNV is dedicated and proud to serve Napa and to promote community well-being through all of our programs and services.”

Pablo Zatarain, *Executive Director*

Corporate Charitable Giving Program

Housing Opportunities & Maintenance for the Elderly (Chicago, Illinois)

Housing Opportunities & Maintenance for the Elderly (H.O.M.E.) is a one-of-a-kind organization that fosters joy, independence, and connection for low-income seniors in Chicago by providing intergenerational housing and housing support services. For H.O.M.E., housing is not a means to an end, but a conduit for supporting the people that society most marginalizes. H.O.M.E. knows that sharing a bus ride, a meal, or a joke, or simply saying hello to others, can make a difference.

Without H.O.M.E. services, many seniors would be unnecessarily living in nursing homes, living in their homes in unsafe conditions, or trying to survive without access to food or medication. Community support allows H.O.M.E. to provide services—intergenerational housing, a shopping bus, moving assistance, and home repairs—that directly improve the well-being of low-income seniors and develop a more equitable, robust, and age-friendly Chicago.



H.O.M.E.'s Executive Director Gail Schechter (R) and Board Member Brad Winick are accompanied by Constance, a resident and a member of the Community Advisory Council, along with Adelaide and Isabella.

“Jeff McDonald and The Doctors Company have provided game-changing support to low-income seniors in Chicago by supporting H.O.M.E.’s intergenerational housing and community-based programs, which encompass home repairs for homeowners, a shopping bus for those living in senior buildings, and moving assistance. Jeff’s passion for older people and his empathy for those challenged by poverty or disability shines through his and The Doctors Company’s unwavering, consistent generosity of time, talent, and treasure.”

Gail Schechter, *Executive Director*

Corporate Charitable Giving Program

Cerebral Palsy Alliance Research Foundation (Nationwide)

TDC Group’s support of the **Cerebral Palsy Alliance Research Foundation (CPARF)** includes sponsoring and participating in the STEPTember fundraising event, which allowed TDC Group employees,



Community Relations team member Susan Duke steps up for cerebral palsy research and disability innovation during the STEPTember challenge.

no matter where they were located, to participate in a month-long wellness and team-building activity. This resulted in 7,265,612 total steps from participating employees—from Healthcare Risk Advisors’ “Out of Step” team in New York to the “Regulatory Compliance Supremes” at The Doctors Company’s headquarters in Napa, California. There was no requirement to raise funds individually, but many employees did, and their contributions were matched through the Employee Gift Matching program.

But the real winners are the individuals who ultimately benefit from the important work of CPARF. CPARF funds U.S.-based research to change what’s possible for people with cerebral palsy (CP), implements proven science, empowers people through education, and advances technology benefiting all disabled people worldwide.

“CP is the most common lifelong physical disability in the world, affecting one million people in the U.S. and 18 million people worldwide. It’s a diverse disability that demands a diverse research portfolio, and we steadfastly support research that serves the whole community. We start at day one with the earliest interventions to potentially lessen CP’s severity or prevent the injury that causes it. We keep going with science that will make it more comfortable for children to get the therapies they need. We continue with research that will uncover new chronic pain treatments for adults. We proudly champion research for every age and every stage. Thank you to TDC Group for your commitment to support life-changing CP research, assistive technology, and innovation.”

Kenyetta Reid, *Corporate Partnerships Manager*

The Doctors Company Foundation

The Doctors Company Foundation is a 501(c)3 nonprofit organization created to support patient safety education for healthcare professionals, both in training and in practice, as well as patient safety research for clinical applications. In 2023, The Doctors Company Foundation awarded grants to six new projects, bringing its funding since its inception in 2008 to nearly \$8 million.

2023 Foundation Grants



The Obvious Solution Is the Midline:

Funding will support the creation of a safety comparison of midline catheter to CVC by collecting real-time occurrence data on complications, including local extravasations, infections, and deep-venous thrombosis on all patients with CVCs or midline catheters. (University of Maryland, Baltimore)



Forum on Advancing Diagnostic

Excellence: Funding will support the development, implementation, dissemination, and monitoring of innovations designed to improve diagnosis in healthcare, with emphasis on conditions and populations at highest risk of harm from diagnostic errors. (National Academies of Sciences, Engineering, and Medicine, Washington, DC)



Improving Pediatric Emergency Care Access With an Integrated Telemedicine

Solution: Funding will support the initial efforts at one hospital to understand the feasibility of implementing a pediatric telehealth platform to integrate telemedicine intervention into community emergency departments. (UCSF Benioff Children's Hospitals, San Francisco)

The Doctors Company Foundation

2023 Foundation Grants (continued)



Is There an Increased Incidence of Lymphedema After IV Placement? A Prospective Analysis Utilizing ICG Fluoroscopy in Patients at Risk for Arm Lymphedema: Funding will support providing objective data to contest the long-standing belief that patients who are at risk for upper-extremity lymphedema should not receive blood draws or IV access from that arm or hand. (City of Hope, Duarte, California)



Reducing Medication Ordering Errors Through Indications-Based Prescribing: Funding will help develop a randomized, controlled trial to assess the effectiveness of indications-based order sets for reducing antimicrobial ordering errors. (Columbia University, City of New York)



Firearm Storage Maps as a Clinical Tool to Prevent Suicide: Funding will support the creation of maps indicating temporary gun storage options in the areas surrounding four Minnesota primary-care clinics, and will incorporate these maps into physicians' firearm-safety counseling of at-risk patients at each site. (Protect Minnesota, Minneapolis)

We will provide study outcomes and publications as they become available. Learn more about the Foundation's work at tdcfoundation.com.



"I am so proud of our Healthcare Risk Advisors team members who come together each year to support the New York Care's Winter Wishes program. TDC Group provides a sponsorship, and our team provides gifts for children and teens served by New York Care's community partners across the city."

Noeleen Doelger, Senior Vice President and Chief Financial Officer, Healthcare Risk Advisors

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For more information about our community investment programs, please visit thedoctors.com/communityinvestment.

TDC Group is the marketing name for The Doctors Company and its subsidiaries and affiliated companies.

