

## PLUS Legacy Report:

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Legacy report: Website – [www.financialfitnessclinic.org](http://www.financialfitnessclinic.org)

This will be attached to your bio on the PLUS website.

- a) Title: The Financial Fitness Clinic
- b) Key words: Personal finance, health, health care, social determinants, economic, economic security, disparities, safety net, vulnerable populations, financial counseling, innovation, primary care.
- c) Learning objectives:
  - a. To learn to build community partnerships
  - b. To learn effective program development and management
  - c. To learn about the connections between an individual's financial and physical health
- d) Project objectives:
  - a. To build a service available to low income San Franciscans under financial stress that addresses social determinants of health
  - b. To educate clinicians about the resources available to them to address patients' social determinants of health
  - c. To create and sustain a clinic dedicated to the intersections of financial and physical health.
  - d. To treat the social determinants of health in referred patients through education, resource referral, and individual counseling, and to build relationships with patients seen over time.
- e) Activities (Partly using objectives listed..) what did you do to reach your objectives?
  - a. We built the Financial Fitness Clinic at San Francisco General Hospital, created the first ever medical-financial partnership, created a network of referring clinicians, and have now served nearly 150 patients through this service.
- f) Outcome:
  - a. Multiple poster presentations documenting strong patient satisfaction with the service
  - b. Nearly 150 patients served.
  - c. Evaluation data that will soon be analyzed on health outcomes, financial outcomes, and patient reported satisfaction.

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- g) Lessons in Implementation (what did you learn in the process of your work?)
  - a. Major lessons learned included leveraging allies in unexpected places (financial institutions), the ability of a small group to achieve large goals through persistent effort, the power of story to persuade clinicians to adopt new practices, and the importance of consistent space for creating welcoming clinical encounters and optimizing outcomes.
- h) Potential future projects:
  - a. Evaluation of a similar intervention in a circumscribed patient population to investigate the impact of the Financial Fitness Clinic on utilization and health outcomes.
- i) Resources (include local individuals/contacts; key organizations - local and national; potential funding sources/grants)
  - a. Organizations: Mission Economic Development Agency, SFGH Foundation, San Francisco Office of Financial Empowerment, Wells Fargo Bank, Union Bank, Comerica Bank, The Mission Asset Fund, HealthLeads, PricewaterhouseCoopers
  - b. Funders: San Francisco Medical Society, Comerica Bank, Union Bank, California Association of Public Hospitals.