



**AATS FOUNDATION**  
Fostering Careers • Developing Leaders



## **AATS Foundation Annual Report 2017**

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*Supporting cardiothoracic surgeons in research and education*

## MISSION

Supporting cardiothoracic surgeons  
in research and education.

## VISION

A dynamic and innovative  
future of continued excellence in  
cardiothoracic surgery.

## VALUES

Global Academic Exchange

Innovation

Collaboration

Advancing Patient Care

Fostering Leadership

Trusted Stewardship

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President of the AATS Foundation

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## FOSTERING CAREERS • DEVELOPING LEADERS



This past year has been full of accomplishments for the AATS Foundation. As you review the highlights presented in this Annual Report, you should be proud that your contributions have enabled cardiothoracic surgeons around the world to enhance their careers and advance innovation in cardiothoracic surgery and patient-care.

This is a pivotal time in the Foundation's history. We've experienced tremendous growth in order to meet the growing needs of the specialty and future generations of surgeons. In addition to expanding many of our time-honored programs, we created new initiatives that will substantially serve the cardiothoracic surgical specialty for many years. These programs are possible because of the generosity of our donors, leaders, and partners, such as you.

With your support, we look forward to continuing our work as the philanthropic arm of the American Association for Thoracic Surgery. As of January 2018, we are continuing our mission of *supporting cardiothoracic surgeons in research and education* under a new name: the AATS Foundation. The name change aligns us closer with the mission and values of the AATS, and by fostering careers and developing leaders, we contribute to upholding the high standard of excellence exemplified in the AATS motto, "A Century of Modeling Excellence."

We are confident that our programs will ensure that the specialty remains on the cutting edge of state-of-the-art technologies and techniques necessary to enhance patient care. We look forward to what the future holds for the AATS Foundation, and we thank you for your support.

With Gratitude,

A handwritten signature in black ink, appearing to read "David J. Sugarbaker". The signature is fluid and stylized, with a long horizontal stroke at the end.

**David J. Sugarbaker, M.D.**  
President, AATS Foundation

# Programs

AATS Foundation's educational and research programs support residents, fellows, and surgeons worldwide to enhance their overall surgical knowledge and technical skills. The Foundation inspires leadership that maintains excellence for future generations of surgeons. Leaders in the field have received funding from the AATS Foundation, and the support they received early in their careers helped them make significant contributions to the specialty.

“The opportunity to work with renowned cardiothoracic surgeons is valuable...”

**-Lingling Huang**

AATS Summer Intern  
Scholarship Award Recipient

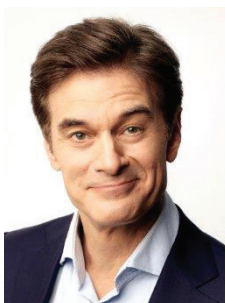


*“The Alton Ochsner Research Scholarship was a key milestone in my academic career. It not only provided funding at an important time in my early career, but it also allowed flexibility to research new avenues of interest that changed my direction of research, established my independent laboratory, and led to sustainable NIH funding for more than a decade.”*

**-YOLONDA L. COLSON, MD**

**ALTON OCHSNER RESEARCH SCHOLAR, 2002-2004**

AATS FOUNDATION BOARD OF DIRECTORS



*“It was a changing moment in my life...It means the world to me that folks looked out and gave me an opportunity when I was finishing my cardiac surgical training, and I want to pay it forward.”*

**-MEHMET C. OZ, MD**

**ROBERT E. GROSS RESEARCH SCHOLAR, 1994-1996**

AATS FOUNDATION BOARD OF DIRECTORS

From the introduction of the first Graham Traveling Fellowship in 1951 to the present day, the AATS and its Foundation have funded millions of dollars in fellowships and research opportunities. The Foundation has grown from just this one fellowship to currently having more than twenty sophisticated programs which are moving the field forward.



*“The Foundation has had a great impact on my career already...It provided a tremendous experience and the opportunity to interact with my colleagues as well as leaders in the field of thoracic surgery...”*

**-JOSEPH D. PHILLIPS, MD**

AATS FOUNDATION SURGICAL ROBOTICS AND  
SURGICAL INVESTIGATOR AWARD RECIPIENT



AATS  
FOUNDATION  
**FACT**

AATS Foundation programs provide a pathway for young cardiothoracic surgeons to become leaders in their field.



## FELLOWSHIP & EDUCATIONAL PROGRAMS

### MULTI-SPECIALTY

- Evarts A. Graham Traveling Fellowship
- AATS Summer Intern Scholarship

“The respect, care, and level of personal responsibility I observed physicians take on and practice in their everyday interactions with patients and co-workers left a lasting impression and are qualities I hope to emulate in my own future career.”

**-Sherry Wu**

AATS Summer Intern Scholarship Award Recipient

### ADULT CARDIAC

- Advanced Valve Disease Educational Fellowship -  
*Sponsored by Medtronic*
- Denton A. Cooley Fellowship
- Every Heartbeat Matters Valve Fellowship -  
*Sponsored by Edwards Lifesciences Foundation*
- Honoring Our Cleveland Clinic Mentors
- James L. Cox Fellowship in Atrial Fibrillation Surgery -  
*Sponsored by AtriCure Inc.*
- Japanese Association for Thoracic Surgery/AATS Foundation Fellowship -  
*Sponsored by Medtronic*
- Lawrence H. Cohn Clinical Scholar Program
- Learn from the Masters: A Clinical Program
- Travel Awards for the AATS Annual Meeting

### CONGENITAL

- Marc R. de Leval Fellowship
- Aldo R. Castaneda Fellowship – *Upcoming Program*

### THORACIC

- F. Griffith Pearson Fellowship
- Jack A. Roth Fellowship in Thoracic Surgical Oncology
- North America Clinical Immersion in Advanced Minimally Invasive Thoracic Surgery Fellowship -  
*Sponsored by Medtronic*
- Surgical Robotics Fellowship –  
*Sponsored by Intuitive Surgical*
- Thoracic Surgery Training Fellowship –  
*Sponsored by Ethicon China*

## RESEARCH PROGRAMS

- Academic Excellence Award
- C. Walton Lillehei Forum
- AATS Research Scholarship
- Surgical Investigator Program
- Timothy J. Gardner Fellowship



“I am very grateful for the AATS Foundation for giving me the opportunity to complement my surgical training with these learning experiences...”

**-NESTOR VILLAMIZAR, MD**

AATS FOUNDATION SURGICAL ROBOTICS, F. GRIFFITH PEARSON, AND FELLOWSHIP FOR ADVANCED MINIMALLY INVASIVE THORACIC SURGERY AWARD RECIPIENT

# Reach and Impact of Your Giving

AATS Foundation programs are advancing innovation in cardiothoracic surgery around the world. Many have been in effect for decades; others have been added over time. AATS Foundation fellowships and research scholarships bring the community of cardiothoracic surgeons together and create bonds that last lifetimes.



## AATS FOUNDATION FACT

The AATS Foundation has provided awards to professionals in six continents and has an impressive international reach, with awardees representing 47 countries



### RESEARCH:

The AATS Foundation is responsible for funding the educational and research initiatives of the AATS. Two major programs include the AATS Research Scholarship and the Surgical Investigator Program.

For more than 30 years, since 1985, the AATS Research Scholarship honors several of the pioneers in cardiothoracic surgery, and some of the leaders of today were early recipients of the scholarship. This award supports a two-year scholarship program for young faculty pursuing an academic career.

One of the newest ways the Foundation supports cutting edge research and the future leaders in the field is through the Surgical Investigator Program. The two-year grant supports young cardiothoracic surgeons in innovative clinical or translational research on topics including outcomes research, robotically assisted surgery, minimally invasive surgery and other applications of new and innovative technologies in cardiothoracic surgery.



Michael E. Halkos, MD, AATS Foundation Surgical Investigator award recipient

### HONORING OUR MENTORS PROGRAMS:

Since 2013, the Foundation has honored several leading surgeons in the specialty: The F. Griffith Pearson Fellowship, the Marc R. de Leval Fellowship, the Denton A. Cooley Fellowship and the Lawrence H. Cohn Clinical Scholar Program. These awards were established by surgeons to honor their mentors' guidance, leadership and dedication. Those that have created these awards are immortalizing their mentors' legacies through these fellowships, as well as helping to cultivate the leaders of tomorrow. The award winners then foster the careers of other young surgeons, thereby continuing the education cycle.



In 2017, the AATS Foundation expanded the Honoring Our Mentors portfolio to include the Jack A. Roth Fellowship in Thoracic Surgical Oncology, the Honoring Our Cleveland Clinic Mentors Program (recognizing Drs. Floyd D. Loop, Delos M. Cosgrove, and Bruce W. Lytle) and two new programs to honor Dr. Timothy J. Gardner and Dr. Aldo R. Castaneda.



### AATS FOUNDATION FACT

AATS Foundation awardees are able to interact and collaborate with some of the world's foremost cardiothoracic surgeons.

### AWARDEE SPOTLIGHT

*"During my first year of medical school, I hadn't been exposed enough to cardiothoracic surgery to seriously consider it as a career choice. However, with the support I received from the AATS Foundation, I was able to connect with a mentor at my institution and conduct scientific research that was ultimately presented at the AATS Annual Meeting. The skills I developed during this opportunity are those I can carry forward as I move toward a career in academic surgery. In what started as a simple research opportunity with a mentor, has led to a lifetime relationship with someone who I can turn to for anything. Not only that, but I had the opportunity to network with other surgeons, both in cardiothoracic surgery and other surgical subspecialties, which has really been invaluable to advancing my career. The opportunity to work closely with a cardiothoracic surgeon on research, in the operating room, and in clinic has been instrumental in developing my understanding of the day to day activities of a cardiothoracic surgeon as well as exposing me to the patient population I would be working with as a future surgeon in the field. The award from the Foundation really sparked my interest in surgery during my first year of medical school, and now I'm in my fourth year and applying for a surgical residency, with a goal of becoming a general thoracic surgeon. And it was all made possible by the donors who provide support for the AATS Foundation."*



-Trevor Davis  
AATS Summer Intern Scholarship Award Recipient

### FELLOWSHIPS:

The Foundation's longest running program is the Evarts A. Graham Memorial Traveling Fellowship which was established in 1951. It provides support for young surgeons outside the U.S. to come to North America to intensify their training in a program of special interest, and to increase their international contacts.

Today the Foundation has numerous cardiac, thoracic, and congenital fellowships that are available for international and North American surgeons. These programs offer a variety of opportunities for those interested in all areas of cardiothoracic surgery, such as robotics surgery, minimally invasive surgery, valve disease, and atrial fibrillation.



# History and Future of the AATS Foundation

In its history, the AATS Foundation has achieved many important milestones.





The next generation of surgeons is the future of cardiothoracic surgery. The advances will be born of their intellect, their curiosity, and perhaps most importantly their connections with each other and with their contemporaries in other disciplines. The future is about teamwork and integration addressing increasingly complex problems in innovative ways. It is critical that the best and the brightest are attracted to this exciting, demanding field and their career development must be supported.



The AATS Foundation is so important to the specialty because its activities are centered around fostering the next generation. The spectrum of individuals supported range from medical students in the summer intern program, to junior faculty via named research awards, various research scholarships, a traveling fellowship, and those in between. With the past as a guide, the future of the AATS Foundation remains strong. It will continue to establish new opportunities that will profoundly enhance the careers of cardiothoracic surgeons, optimize patient care, advance innovation in cardiothoracic surgery around the world, and fulfill the missions of the AATS and its Foundation.



“I support the Foundation as a way to honor one of my great mentors, Dr. Jack A. Roth. His support to me during my career has been invaluable. And this is a way that, along with others, I can thank him. In addition, it is a way to support the next generations of surgeons looking to master the field of thoracic surgical oncology.”

**-Reza J. Mehran, MD**  
AATS Foundation Donor

#### AATS FOUNDATION 2017-2020 STRATEGIC PLAN

The AATS Foundation will continue the educational, scientific and charitable works of the AATS working through the following Goal Areas:

**Programs:** AATS Foundation will optimize program opportunities

**Finance:** AATS Foundation will grow its financial resources

**Organizational Capacity:** AATS Foundation will have sufficient organizational resources to meet the Foundation's needs



#### AATS FOUNDATION FACT

To date, nearly \$10 million in education and research awards have been funded by the AATS and its Foundation.



“I support the Foundation as I am extraordinarily grateful to the Association for all of the opportunities that it has afforded me. I am a determined advocate of the AATS mission, and I truly believe in the value and vital role of the AATS in the education of the next generation and the advancement of our specialty.”

**-Y. Joseph Woo, MD**  
AATS Foundation Advisory Council member

# Support the AATS Foundation

AATS Foundation programs are made possible by the generous support of donors, leaders, and partners. The Foundation offers a variety of options for donors who want to ensure the future of cardiothoracic surgery. Learn more about the various ways to make a gift today to foster the next generation of surgeons. Please be assured that 100 percent of individual contributions go directly toward programs.



*"I support the Foundation because it is the core effort from a philanthropic standpoint to support our educational and innovative efforts."*

**-JOSEPH S. COSELLI, MD**  
AATS PAST PRESIDENT & AATS  
FOUNDATION BOARD OF DIRECTORS

## INDIVIDUAL GIVING

### Direct Gifts

Visit the Make a Donation page on [www.aatsfoundation.org](http://www.aatsfoundation.org), or mail your gift in the enclosed envelope to show your support and allow the Foundation's many programs and activities to expand and grow.

### Stock

Give a gift of appreciated securities, which can reduce your capital gains tax exposure.

### Donated Honoraria

Transfer an honorarium to the Foundation in your name, and the gift will be counted toward your cumulative giving total.

### Planned Gifts

When planning your estate, consider a gift to the Foundation. Please let us know when you have made a decision to include the AATS Foundation in your estate plan.

#### > Options include:

**Make a Provision/Bequests:** Allocate a percent or a specific dollar value to the Foundation in your will. Donors are able to designate their bequests toward particular areas of the Foundation, and can create a permanent endowment fund if the underlying assets are sufficient.

**Charitable Remainder Trust:** Name the Foundation as beneficiary of this individually managed trust, providing income for life. It can be funded with cash, appreciated securities or real estate. This option not only provides U.S. tax benefits, but also reduces probate and estate costs.

**Life Insurance:** Make the Foundation the beneficiary of an existing or new policy. Insurance can also replace assets earmarked for a charitable gift.

**Individual Retirement Account (IRA):** Gift your IRA subject to US tax regulation.



*"I support the Foundation because I believe this is one of the most important things that any cardiothoracic surgeon can do to ensure that our patients, past and future, will receive the best care and that the newest technologies and treatments will be available to those patients."*

**-Duke E. Cameron, MD**  
98th AATS President

These charitable contributions are all tax deductible to the full extent of US law. For questions or to support the critical work of the AATS Foundation, contact Katie Federico, Director of Development, at [kfederico@aats.org](mailto:kfederico@aats.org) or 978-252-2200 Ext. 544.

# AATS Foundation Partners

The AATS Foundation partners with corporations and organizations to fund select educational programs.

Help advance patient care and ensure excellence in cardiothoracic surgery by becoming a distinguished partner. The AATS Foundation Development Office will work closely with your staff to create a mutually beneficial relationship.

## CURRENT PROJECTS SUPPORTED BY PARTNERS INCLUDE:

### AtriCure®

James L. Cox Fellowship in  
Atrial Fibrillation Surgery

### ETHICON

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Shaping the future of surgery  
Surgical Investigator Award



### EDWARDS LIFESCIENCES FOUNDATION

Every Heartbeat Matters Valve Fellowship  
International Cardiovascular Symposium  
International Cardiovascular Symposium Travel Awards  
Lawrence H. Cohn Scholar Clinical Program

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Thoracic Surgery Training Fellowship



Advanced Valve Disease Educational Fellowship  
North America Clinical Immersion In Advanced  
Minimally Invasive Thoracic Surgery  
Japanese Association for Thoracic Surgery/AATS  
Foundation Fellowship

### INTUITIVE

Advanced Lobectomy Course  
Surgical Investigator Award  
Surgical Robotics Fellowship



*Surgical products designed and  
manufactured by the Scanlan family since 1921*

AATS Summer Intern Scholarship

## THANK YOU TO THE FOLLOWING 2017 ORGANIZATIONAL SUPPORTERS:



AMERICAN ASSOCIATION  
FOR THORACIC SURGERY  
*A Century of Modeling Excellence*



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Children's  
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Katie Federico, Director of Development,  
at [kfederico@aats.org](mailto:kfederico@aats.org) or  
978-252-2200 Ext. 544.



AATS  
FOUNDATION  
**FACT**

The AATS Foundation provides unique opportunities to enhance and develop surgeons' knowledge and skills through strong partnerships with industry.



# Lifetime Giving Circle Members and 2017 Donors & Sponsors

The AATS Foundation is grateful for donors who have made significant contributions throughout the years. Thank you to the following Lifetime Giving Circle Members who have given \$5,000 or more throughout the course of their giving history\*:

*\*Giving history through 2017*

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American Association for  
Thoracic Surgery  
Edwards Lifesciences Foundation  
Intuitive Surgical, Inc.

## Presidents' Circle

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# 2017 Numbers

During the 2017 fiscal year, the AATS Foundation continued to expand its education and research opportunities with new programs such as the Timothy J. Gardner Fellowship Program, the Honoring Our Cleveland Clinic Mentors Program, and the Jack A. Roth Fellowship in Thoracic Surgical Oncology Program.

Contribution receipts totaled \$2,685,017, reflecting an increase of 12 percent from 2016. This increase is due to a positive response and significant contributions/pledges to several new Honoring Our Mentors initiatives, and an influx of year-end contributions.

AATS support received for several programs and administrative costs were \$587,244 and \$579,542 in 2017 and 2016, respectively.

**Total expenditures** amounted to more than \$1.6 million (see chart), which breaks down as follows:

**Grants and contributions:** \$1,260,866 (compared to \$1,359,834 in 2016).

**General and administrative expenses:** \$339,663 (compared to \$324,415 in 2016).

**Development costs:** \$36,614 (compared to \$52,108 in 2016).

**Committee costs:** \$20,486 (compared to \$7,394 in 2016). This increase is due to a bi-annual meeting to update the Foundation's Strategic Plan and future initiatives.

**Meetings & Education costs:** \$5,961 (compared to \$7,014 in 2016).

We ended the fiscal year with unrestricted net assets of \$3,581,260 and \$2,716,756 in net assets restricted for programs in 2018 and beyond.

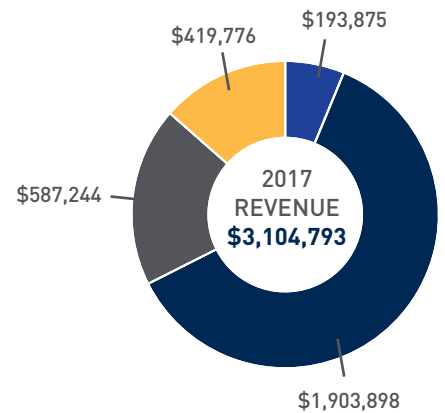
The financial position of the AATS Foundation remains strong.



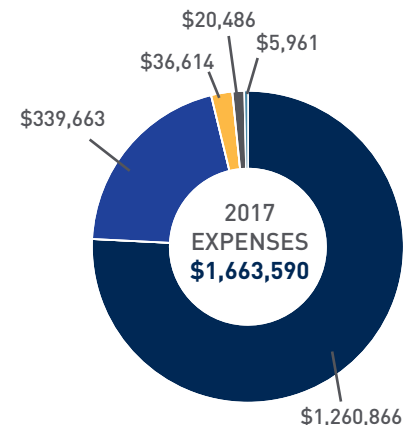
**Thomas L. Spray, MD**  
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## STATEMENT OF FINANCIAL POSITION

December 31, 2017	2017 (Unaudited)	2016 (Audited)
<b>ASSETS</b>		
Cash	\$2,325,342	\$1,501,792
Investments	\$4,405,826	\$3,338,989
Accounts Receivable	\$67,709	\$57,698
Pledge Receivable	\$409,660	\$879,506
<b>Total Assets</b>	<b>\$7,208,537</b>	<b>\$5,777,985</b>
<b>LIABILITIES</b>		
Accounts Payable	\$22,475	\$3,623
Grants Payable	\$888,046	\$917,550
<b>Total Liabilities</b>	<b>\$910,521</b>	<b>\$921,173</b>
<b>NET ASSETS</b>		
Unrestricted	\$3,581,260	\$2,845,080
Temporarily Restricted	\$2,716,756	\$2,011,732
<b>Total Net Assets</b>	<b>\$6,298,016</b>	<b>\$4,856,812</b>
<b>Total Net Assets &amp; Liabilities</b>	<b>\$7,208,537</b>	<b>\$5,777,985</b>



- Grants & Contributions: Restricted Funds
- Grants & Contributions: General Unrestricted Funds
- Investment Income
- AATS Grant



- Grants & Contributions
- General & Administrative
- Development
- Committee
- Meetings & Education



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The AATS Foundation is the new name of the American Association for Thoracic Surgery's philanthropic arm. This change reflects the growth of the Foundation, and more closely aligns it with the mission and values of the AATS.