California Summit on Long-Term Services and Supports: Advancing Person-Centered Care

September 13, 2016
Sacramento Convention Center
Dear Colleague,

I welcome each of you to The SCAN Foundation’s sixth Annual California Summit on Long-Term Services and Supports (LTSS) Summit. Our theme this year is *Advancing Person-Centered Care.*

California’s LTSS system has undergone meaningful change, with new models of care being implemented to serve older adults and persons with disabilities. We hope today’s presentations will stimulate dialogue about the principles and philosophy behind person-centered care and how this approach aligns with and can support California’s evolving LTSS landscape.

Thank you for participating in this year’s Summit and bringing your expertise and passion to this gathering.

Bruce Chernof, MD
President & CEO
Executive Team

BRUCE A. CHERNOF, MD  
President & Chief Executive Officer

GRETCHEN E. ALKEMA, PHD, LCSW  
Vice President, Policy & Communications

RENÉ SEIDEL, DIPLOM SOCIOLOGIE (FH)  
Vice President, Programs & Operations

Program Staff

MEGAN BURKE, MSW  
Policy Analyst

SUSAN DOLES  
Program Associate

MEGAN JURING  
Program Officer

MARI NICHOLSON, MHS  
Director of Communications

KALI PETERSON, MS, MPA  
Program Officer

KAREN SCHEBOOTH, MS  
Director of Grants Administration

SARAH S. STEENHAUSEN, MS  
Senior Policy Advisor

ERIC THAI, CPA, MBA  
Director of Finance

ERIN WESTPHAL, MS  
Program Officer

Administrative Staff

GINA ALFEREZ  
Executive Assistant
2016 California Summit on Long-Term Services and Supports: Advancing Person-Centered Care

**SUMMIT OVERVIEW**

Sacramento Convention Center Facility Map ................................................................. Pg. 1

Agenda in Detail ................................................................................................................. Pg. 2

**AGENDA AT A GLANCE**

9:00 a.m.  Morning Plenary Sessions

Welcome and Opening Remarks................................................................. Pg. 10

Morning Keynote - Bringing Person-Centered Care to Life........ Pg. 11

Morning Panel - LTSS in California: The State of the State ............ Pg. 12

11:00 a.m. Morning Concurrent Sessions

New Kids on the Block: Whole Person Care and Health Homes ...... Pg. 16

Moving the Needle on Long-Term Care Financing................................. Pg. 20

Fostering Care Coordinators in Your Integrated Model......................... Pg. 26

8 Steps for Using Social Media to Maximize Engagement............... Pg. 30
Table of Contents

12:30 p.m.  Meet the Speakers Lunch ................................................................. Pg. 34

1:30 p.m.  Afternoon Concurrent Sessions

New Quality Measure Approaches for Person-Centered Care........ Pg. 38

Evaluating CCI: What’s Next for the Program?............................. Pg. 44

Disability and Diversity in California’s Aging Population:
Future Predictions and System Implications................................. Pg. 48

Getting Person-Centered to Get Results..................................... Pg. 54

3:15 p.m.  Closing Plenary

The Politics of 2016 and the Policies of 2017: Bringing LTSS to
the Forefront................................................................................ Pg. 58

4:00 p.m.  Networking Reception

Abbreviations and Acknowledgements

Commonly Used Acronyms .......................................................... Pg. 60

Acknowledgements ...................................................................... Pg. 66

Contact Information..................................................................... Pg. 67
If you have questions or need assistance, please visit the registration table located in the East Lobby.
2016 California Summit on Long-Term Services and Supports: Advancing Person-Centered Care

8:00 a.m.  **SUMMIT REGISTRATION OPENS**  
*East Lobby*  
Refreshments are available in the East Lobby.

9:00 a.m.  **WELCOME AND OPENING REMARKS**  
*Ballroom*  
Bruce Chernof, MD  
President & CEO  
The SCAN Foundation

9:15 a.m.  **MORNING KEYNOTE**  
*Ballroom*  
Bringing Person-Centered Care to Life

Laura Mosqueda, MD  
Chair, Department of Family Medicine  
Associate Dean, Keck School of Medicine  
University of Southern California

9:45 a.m.  **MORNING PANEL**  
*Ballroom*  
LTSS in California: The State of the State

Athena Chapman  
Director, State Programs  
California Association of Health Plans

Jennifer Kent  
Director  
California Department of Health Care Services

Marty Lynch, PhD, MPA  
Executive Director & Chief Medical Officer  
LifeLong Medical Care
Jane Ogle (Moderator)
Consultant

10:45 a.m.  Break

11:00 a.m.  MORNING CONCURRENT SESSIONS

Room 306  New Kids on the Block: Whole Person Care and Health Homes

Kathleen A. Clanon, MD
Medical Director
Health Care Services Agency of Alameda County

James Cotter, MD, MPH
Regional Medical Director, Health Services Department
Partnership HealthPlan of California

Sharon Rapport
Associate Director, California Policy
Corporation for Supportive Housing

Kathleen Wilber, PhD (Moderator)
Mary Pickford Foundation Professor of Gerontology
Professor of Health Services
University of Southern California, Davis School of Gerontology

Room 314  Moving the Needle on Long-Term Care Financing

Ai-jen Poo
Director
National Domestic Workers Alliance

Hugh Slayden
Principal Consultant
California State Senate Insurance Committee
Anne Tumlinson  
Founder  
Daughterhood.org 

Jeannee Parker Martin (Moderator)  
President & Chief Executive Officer  
LeadingAge California  

Room 307  
Fostering Care Coordinators in Your Integrated Model 

Michele Lee, LCSW  
Manager, Community Liaison & Long-Term Support and Services  
Health Plan of San Mateo 

Helen McNeal  
Executive Director  
California State University Institute for Palliative Care  
California State University San Marcos 

Lori Peterson, MA (Moderator)  
Chief Executive Officer  
Collaborative Consulting  

Room 304/305  
8 Steps for Using Social Media to Maximize Engagement 

Zack Langway  
Vice President, Global Development  
Fenton Communications 

Mari Nicholson, MHS (Moderator)  
Director of Communications  
The SCAN Foundation
12:30 p.m.  
**Meet the Speakers Lunch**  
*Small group discussions during lunch.*

1:30 p.m.  
**AFTERNOON CONCURRENT SESSIONS**

**Room 314**  
**New Quality Measure Approaches for Person-Centered Care**

Jessica Briefer French  
Senior Research Scientist  
National Committee for Quality Assurance

Tracy Lustig, DPM, MPH  
Senior Director  
National Quality Forum

Anwar Zoueihid  
Vice President, Health Services  
Partners in Care Foundation

René Seidel, Dipl Soz Paed (FH) (Moderator)  
Vice President, Programs and Operations  
The SCAN Foundation

**Room 307**  
**Evaluating CCI: What’s Next for the Program?**

Sarah Brooks  
Deputy Director, Health Care Delivery Systems  
California Department of Health Care Services

Mark DiCamillo  
Senior Vice President  
Field Research Corporation
Agenda in Detail

Room 306

Disability and Diversity in California’s Aging Population: Future Predictions and System Implications

Amber Didier  
Senior Fiscal and Policy Analyst  
Legislative Analyst’s Office

Adam Dorsey  
Assistant Program Budget Manager  
California Department of Finance

Callie Freitag  
Fiscal and Policy Analyst  
Legislative Analyst’s Office

Elsa Quezada  
Executive Director  
Central Coast Center for Independent Living

Edie Yau  
Director, Diversity and Inclusion  
Alzheimer’s Association, Northern California & Northern Nevada Chapter

Sandra F. Fitzpatrick, MA (Moderator)  
Executive Director  
California Commission on Aging
Room 304/305  Getting Person-Centered to Get Results

Dawn Butler, MSW, JD  
Director  
GRACE Training and Resource Center  
Indiana University School of Medicine

Eric Thai, CPA, MBA  
Director of Finance  
The SCAN Foundation

Erin Westphal, MS (Moderator)  
Program Officer  
The SCAN Foundation

3:00 p.m.  BREAK

3:15 p.m.  CLOSING PLENARY

Ballroom  The Politics of 2016 and the Policies of 2017: Bringing LTSS to the Forefront

Robert Blancato  
President  
Matz, Blancato, & Associates

4:00 p.m.  NETWORKING RECEPTION

East Lobby
Visit our mural in the East Lobby.

Thinking about care and support as you grow older, what one word describes what you want?
Welcome & Opening Remarks

Bruce A. Chernof, MD
President & Chief Executive Officer
The SCAN Foundation
BChernof@TheSCANFoundation.org
@DrBruce_TSF

Bruce Chernof, MD, is the President and CEO of The SCAN Foundation, whose mission is to advance a coordinated and easily navigated system of high-quality services for older adults that preserve dignity and independence. Dr. Chernof recently served as the Chair of the Federal Commission on Long-Term Care. Previously he served as the Director and Chief Medical Officer for the Los Angeles County Department of Health Services. He completed his residency in internal medicine as well as a fellowship in medical education at the UCLA School of Medicine. He earned his medical degree from UCLA and completed undergraduate work at Harvard University.

NOTES:
Person-centered care puts people, especially those with complex care needs, at the center of the decision-making process. Successful models make use of a team that considers the full range of needs of individuals and their families. The opening speaker will unpack the principles and philosophy behind person-centered care and provide a brief orientation. Learn what is in store for the rest of the day.

Laura Mosqueda, MD
Chair, Department of Family Medicine
Associate Dean, Keck School of Medicine
University of Southern California
Laura.Mosqueda@Med.USC.edu
@MosquedaMD

Laura Mosqueda, MD, is a Professor of Family Medicine and Gerontology at the Keck School of Medicine of the University of Southern California, where she is also Associate Dean of Primary Care and Chair of the Department of Family Medicine. She directs the National Center on Elder Abuse, a federally funded center housed at USC that disseminates resources on policy, research, and training that relate to neglect and exploitation of older adults.

Dr. Mosqueda is interested in care for vulnerable populations and is passionate about person-centered care as well as interprofessional education. Her research has been in the area of elder abuse, particularly related to people with dementing illness. She has taught professionals in many fields including medicine, criminal justice, and social services.
The morning plenary will provide a high-level overview of the emerging initiatives and cross-cutting issues that are impacting California’s LTSS landscape, including promising approaches, challenges, and opportunities that intersect with the LTSS system. Hear insights from the state and health plan community, as well as home- and community-based service provider perspectives. Each will elevate key questions and considerations for engaging at the state and local levels.

Speakers:

**Athena Chapman**
Director, State Programs
California Association of Health Plans

**Jennifer Kent**
Director
California Department of Health Care Services

**Marty Lynch, PhD, MPA**
Executive Director and Chief Medical Officer
LifeLong Medical Care

Moderator:

**Jane Ogle**
Consultant
Athena Chapman serves as the Vice President of State Programs for the California Association of Health Plans (CAHP). She works with various state agencies and the California Health Benefit Exchange on regulation development and implementation. Prior to joining CAHP in 2012, Chapman worked at the Medi-Cal Managed Care Division at the Department of Health Care Services (DHCS), focusing on managed care quality, policy, oversight, and contracting. Chapman also spent six years at the Centers for Medicare and Medicaid Services (CMS), where she monitored the effective delivery of managed care programs for Medicaid and Medicare beneficiaries in the western region.

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Jennifer Kent
Director
California Department of Health Care Services (DHCS)
Jennifer.Kent@DHCS.ca.gov
@DHCSDirector

Governor Brown appointed Jennifer Kent as Director of the Department of Health Care Services (DHCS) in January 2015. Director Kent oversees a staff of 3,700 individuals at DHCS, which is responsible for the operation of Medi-Cal, the state’s Medicaid program. The Department manages $93 billion public funds annually, which supports the health of more than 13.3 million Californians. Prior to this, Ms. Kent served as Principal of Health Management Associates, Inc. and Executive Director of Local Health Plans of California. Her previous California government service included leadership roles in legislative, intergovernmental, financial and health policy areas with DHCS, the Office of the Governor, and the Health and Human Services Agency.
Jane Ogle is the former Deputy Director for Healthcare Delivery Systems at the Department of Health Care Services (DHCS). At DHCS, Ms. Ogle was responsible for the Long-Term Care Division that oversees programs for the most at-risk older adults in the state, as well as the Coordinated Care Initiative that integrates Medicare and Medi-Cal services with long-term services and supports through managed Medi-Cal health plans. Prior to her work at the state, Ms. Ogle was the first Chief Operational Officer at Santa Clara Family Health Plan. She spent more than 20 years in hospital administration at hospitals in Trenton and Princeton, New Jersey.
The Whole Person Care Pilots and Health Home Program will impact the LTSS landscape in large and small ways. This session will highlight promising LTSS system practices and implications; identify ways for local engagement; examine challenges and opportunities in planning and implementing the new initiatives; and gain insight into areas for further policy development.

Speakers:

Kathleen A. Clanon, MD
Medical Director
Health Care Services Agency of Alameda County

James Cotter, MD, MPH
Regional Medical Director, Health Services Department
Partnership HealthPlan of California

Sharon Rapport
Associate Director, California Policy Corporation for Supportive Housing

Moderator:

Kathleen Wilber, PhD
Mary Pickford Foundation Professor of Gerontology
Professor of Health Services
University of Southern California, Davis School of Gerontology
Kathleen Anne Clanon, MD, is currently serving as the Medical Director of Alameda County’s Health Care Services Agency in San Leandro. She is also an Assistant Professor of Clinical Medicine at the University of California, San Francisco, and a Consultant on Quality Improvement for the National Quality Center and HIVQUAL Program. An internal medicine physician who specializes in HIV/AIDS, Dr. Clanon is responsible for establishing and maintaining multidisciplinary HIV prevention and care programs for low-income people and developing new programs. Dr. Clanon is also involved in comprehensive primary care access to clinical trials and specialty services for women, Spanish-speaking people, and those co-infected with Hepatitis C.

James Cotter, MD, MPH, joined Partnership HealthPlan of California (PHC) in 2014. His responsibilities include PHC operations for Napa County and management of the intensive outpatient care management programs for medically complex patients and palliative care programs across PHC service areas. Prior to joining PHC, Dr. Cotter served in the National Health Service Corps and practiced as a solo family physician. He also served as an Associate Medical Director for Hospice and as Manager of the Special Needs Patient Care Management Program at Kaiser Vallejo Medical Center.
Sharon Rapport  
Associate Director, California Policy 
Corporation for Supportive Housing  
Sharon.Rapport@CSH.org  
@CSHInfo

As the Associate Director for California Policy at the Corporation for Supportive Housing (CSH), Sharon Rapport advances a California policy agenda across multiple issues impacting people experiencing homelessness. Ms. Rapport was instrumental in passing CSH-sponsored legislation to create a Medicaid benefit for housing-based services, a ballot initiative to repurpose existing bonds to fund the creation of thousands of apartments affordable to low-income and homeless veterans, and funding for housing and services for homeless child-welfare-involved families. She also provided technical assistance to the Department of Health Care Services in creating a housing and services proposal for California’s 1115 Medicaid Waiver. Prior to joining CSH, Ms. Rapport worked as a Congressional Fellow for U.S. Senator Jack Reed (D-RI) and managed a large legal office as a Hearing Office Director for the Office of Hearings & Appeals (SSA).

Kathleen Wilber, PhD  
Mary Pickford Foundation Professor of Gerontology  
Professor of Health Services  
University of Southern California, Davis School of Gerontology  
Wilber@USC.edu  
@WilberKate2

Kathleen Wilber, PhD, is the Mary Pickford Foundation Professor of Gerontology and Professor of Health Services Administration at the University of Southern California, Leonard Davis School of Gerontology. She is also Co-Director for the Los Angeles Caregiver Resource Center and the National Center on Elder Abuse. Dr. Wilber’s research team focuses on improving health outcomes and quality of life for vulnerable older adults, including those with chronic illness, disability, cognitive impairment, and/or economic insecurity.
Data on long-term care financing is being used by the U.S. Department of Health and Human Services, the Social Security Administration, and the state of Hawaii to advance affordable, accessible solutions. Presenters during his session will review this data and the latest public policy recommendations from the Bipartisan Policy Center and LeadingAge. Presentations will be followed by a discussion of California’s current approach to addressing the financing of LTSS and ways to engage with legislative and programmatic policy opportunities.

**Panelists:**

- **Ai-jen Poo**
  Director
  National Domestic Workers Alliance

- **Hugh Slayden**
  Principal Consultant
  California State Senate Insurance Committee

- **Anne Tumlinson**
  Founder
  Daughterhood.org

**Moderator:**

- **Jeannee Parker Martin**
  President & Chief Executive Officer
  LeadingAge California
Ai-jen Poo
Director
National Domestic Workers Alliance
Aijen@DomesticWorkers.org
@aijenpoo

Ai-jen Poo is the Director of the National Domestic Workers Alliance and Co-Director of the Caring Across Generations campaign. She began organizing immigrant women workers nearly two decades ago, and in 2000 she co-founded Domestic Workers United (DWU) - the New York organization that spearheaded the successful passage of the state’s historic Domestic Workers Bill of Rights in 2010. Together with 11 other organizations, DWU launched the National Domestic Workers Alliance in 2007. After noticing an increase in the number of domestic workers originally hired as nannies and housekeepers being asked to provide home care for their employers’ aging relatives, she co-led the launch of the Caring Across Generations campaign in 2011 to ensure access to affordable care for the nation’s aging population and access to quality jobs for the caregiving workforce.

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Hugh Slayden
Principal Consultant
California State Senate Insurance Committee
Hugh.Slayden@sen.ca.gov

Hugh Slayden is one of two Principal Consultants with the California State Senate Committee on Insurance and has been with the committee since 2012. His policy areas include life, disability, and long-term care insurance. Prior to joining the committee, he practiced administrative and professional licensing law.
Anne Tumlinson is the founder of Daughterhood.org, an organization dedicated to providing content and information for women navigating the health and elder care systems on behalf of their parents. She also works with policy and provider organizations to encourage and support innovation in how we pay for and deliver care to frail older adults. Ms. Tumlinson has testified before the U.S. House Energy and Commerce Committee, the Senate Aging Committee, the Congressional Long-Term Care Commission, and the Bipartisan Policy Center. She has served in a variety of positions over her career, including as a Senior Vice President at the DC-based consulting firm Avalere Health, the White House Budget Office, and as a Health and Aging Policy Aide for Congressman John Lewis.

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Ms. Martin’s background includes extensive work with both associations and non-profit Boards, having served on 15 Boards at local, state, and national levels. She previously served as the President and CEO of The Corridor Group, and of Visiting Nurses and Hospice of San Francisco.
THE MULTI-PRONGED SOLUTION

Timely recommendations to improve #LTCFinancing
While not new to the health care sector itself, care coordination across health and community-based social supports presents an opportunity to re-envision how services can be delivered in a person-centered way. This session will focus on capacity and skill-building for care coordinators to ensure successful integration. Learn from first-hand experiences how a new training program is supporting health plans in achieving their vision.

**Panelists:**

Michele Lee, LCSW  
Manager, Community Liaison & Long-Term Support and Services  
Health Plan of San Mateo  

Helen McNeal  
Executive Director  
California State University Institute for Palliative Care  
California State University San Marcos

**Moderator:**  
Lori Peterson, MA  
Chief Executive Officer  
Collaborative Consulting
Michele Lee, LCSW  
Manager, Community Liaison & Long-Term Support and Services  
Health Plan of San Mateo  
Michele.Lee@HPSM.org

Michele Lee, LCSW, is a medical social work professional with 18 years of experience in various health care environments including public health, community health, primary care, and acute care. In her current role at the Health Plan of San Mateo (HPSM), she is responsible for the integration of long-term services and supports into the managed care model. She also oversees the Community-Based Adult Services (CBAS) and Multipurpose Senior Services Program (MSSP) benefits administration, as well as care coordination activities related to long-term services and supports. Prior to this, Ms. Lee was a Social Work Case Management Supervisor at HPSM.

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Helen McNeal  
Executive Director  
California State University Institute for Palliative Care  
California State University San Marcos  
HMcNeal@CSUSM.ed  
@Helencsupalcare

Helen McNeal is the founding Executive Director of the California State University Institute for Palliative Care located at Cal State University San Marcos and Project Leader for its Care Excellence Case Management Education program. Prior to joining the Institute, she was Vice President of San Diego Hospice and The Institute for Palliative Medicine. From 1998 to 2000, Ms. McNeal was the National Director of Training and Development for the American Diabetes Association, and prior to that time was President, Managing Partner, and Co-Founder of Bridgepoint: The Centre for Human Resource Development in Toronto, Canada.
Lori Peterson, MA, has a background in psychology and organizational development, as well as 25 years of experience in the healthcare industry. Her expertise ranges from business development to strategic partnerships, cross-sector collaborative development to multi-stakeholder facilitation, to new service design and change activation and implementation. Ms. Peterson has led and facilitated various multi-stakeholder work groups, consisting of representation from the hospital to post-acute sectors, to community-based organizations, and community members. Recent work includes the design and implementation of post-acute care and community-based networks, assessment and re-organization of community-based leadership teams to ensure the sustainability of initiatives with the health care sector, and grant strategy with foundations re-thinking how to better serve the aging network.

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Social media is an effective tool for engaging stakeholders, but it can be tricky. Choosing a platform, building your following, and maintaining enthusiasm are key factors for success. This workshop will provide you with new understanding of social media platforms and strategies, as well as skills for using teasers, visual content, and hashtags for crafting bold and winning messages. **NOTE:** Attendees will be encouraged to use their personal devices and social media accounts during this workshop.

**Panelists:**

Zack Langway
Vice President, Global Development
Fenton Communications

**Moderator:**

Mari Nicholson, MHS
Director of Communications
The SCAN Foundation
Tweets. Tags. Likes. Shares.

Come learn about social media strategies!

#LTSSsummit
Zack Langway is a Senior Vice President with Fenton, a social change agency committed to advancing progressive action on the most pressing social issues affecting families and communities around the world. Mr. Langway leads Fenton's global development practice and has trained thousands of health care providers, nurse leaders, youth advocates, midwives, and other storytellers in how to use digital media as a platform for leadership. From grassroots to global, he works with organizations of all sizes to put human-centered stories first in advocacy for health and wellness.

Mari Nicholson, MHS, serves as Director of Communications for The SCAN Foundation and is responsible for overseeing its communication strategies and grantmaking. Ms. Nicholson has extensive public health and communication experience, developing dynamic products that inform and engage key audiences. Previously she served as a Senior Communications Officer at FHI 360, leading external communications for the National Collaborative on Childhood Obesity Research (NCCOR). She also provided technical assistance to communities implementing programs that prevent and reduce chronic disease and improve community health, including older adult health. Prior to working in the nonprofit sector, Ms. Nicholson was a reporter, columnist, and copy editor for the Los Angeles Newspaper Group.
Meet the Speakers Lunch

12:30 p.m.  Ballroom
Meet the Speakers Lunch

Participants are invited to join the following speakers in small group discussions during lunch. Table assignments will be displayed on the ballroom screens.

Robert Blancato
President
Matz, Blancato, & Associates
(Biography on Page 58)

Jessica Briefer French
Senior Research Scientist
National Committee for Quality Assurance
(Biography on Page 39)

Dawn Butler, MSW, JD
Director
GRACE Training and Resource Center
Indiana University School of Medicine
(Biography on Page 55)

Athena Chapman
Director, State Programs
California Association of Health Plans
(Biography on Page 13)

Mark DiCamillo
Senior Vice President
Field Research Corporation
(Biography on Page 45)

Sandra F. Fitzpatrick, MA
Executive Director
California Commission on Aging
(Biography on Page 52)

Stephanie Gibbs, JD
Senior Program Officer
Center for Health Care Strategies
(Biography on Page 46)

Carrie Graham, PhD, MGS
Assistant Director of Research
Health Research for Action
University of California, Berkeley
(Biography on Page 46)
Meet the Speakers Lunch

Zack Langway
Vice President, Global Development
Fenton Communications
*(Biography on Page 32)*

Tracy Lustig, DPM, MPH
Senior Director
National Quality Forum
*(Biography on Page 39)*

Marty Lynch, PhD, MPA
Executive Director & Chief Medical Officer
LifeLong Medical Care
*(Biography on Page 14)*

Helen McNeal
Executive Director
California State University Institute for Palliative Care
California State University San Marcos
*(Biography on Page 27)*

Jane Ogle
Consultant
*(Biography on Page 14)*

Lori Peterson, MA
Chief Executive Officer
Collaborative Consulting
*(Biography on Page 28)*

Ai-jen Poo
Director
National Domestic Workers Alliance
*(Biography on Page 21)*

Hugh Slayden
Principal Consultant
California State Senate Insurance Committee
*(Biography on Page 21)*

Anne Tumlinson
Founder
Daughterhood.org
*(Biography on Page 22)*

Kathleen Wilber, PhD
Mary Pickford Foundation Professor of Gerontology
Professor of Health Services
University of Southern California, Davis School of Gerontology
*(Biography on Page 18)*

A diagram of the discussion tables is available on page 36.
Highlighted tables are reserved for small group discussions. Speaker table assignments will be displayed on the two ballroom screens near the stage.

If you need assistance, please locate the nearest staff member.

NOTES:
Several efforts are underway to measure the quality of person-centered care programs. This session will focus on key attributes of a high-quality system of care for persons with complex care needs; present case studies that elevate communities using data and measures to improve services and supports; highlight the newly NCQA-approved health plan and case management accreditations for long-term services and supports; and provide reflections of a community-based organization on these new efforts. This session will afford you with a better understanding of how quality measurement can impact and benefit providers and the populations they serve.

**Panelists:**

**Jessica Briefer French**  
Senior Research Scientist  
National Committee for Quality Assurance

**Tracy Lustig, DPM, MPH**  
Senior Director  
National Quality Forum

**Anwar Zoueihid**  
Vice President, Health Services  
Partners in Care Foundation

**Moderator:**  
**René Seidel, Dipl Soz Paed (FH)**  
Vice President, Programs and Operations  
The SCAN Foundation
Tracy Lustig, DPM, MPH, joined the National Quality Forum (NQF) as a Senior Director in March 2016. Dr. Lustig was trained in podiatric medicine and surgery and spent several years in private practice. From 2004-2016, Dr. Lustig was a Senior Program Officer at the Institute of Medicine (IOM) where much of her work focused on the health care workforce and the aging of the U.S. population. She was the Director for consensus studies on the geriatrics workforce, oral health, and ovarian cancer. She also directed workshops on the challenges of an aging society, the allied health workforce, the use of telehealth to serve rural populations, assistive technologies, and hearing loss.
Mr. Zoueihid has spent the last 17 years as a program administrator in the care management sector. He started his career directly delivering culturally appropriate services to his clients. Today, he continues to implement progressive change within older adult care and complex case management as the Vice President of Health Services at Partners in Care Foundation (Partners). Mr. Zoueihid oversees all direct service contracts at Partners, supervises four state-funded Multipurpose Senior Services Programs, and provides strategic direction and key insights into the development of a regional network of home- and community-based organizations.

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René Seidel, Dipl Soz Paed (FH)
Vice President, Programs and Operations
The SCAN Foundation
RSeidel@TheSCANFoundation.org
@TheSCANFndtn

René Seidel, Dipl Soz Paed (FH), is Vice President of Programs and Operations at The SCAN Foundation. Prior to his current position, Mr. Seidel worked for the Los Angeles County Department of Health Services in a number of positions, including State Grants Manager for the Office of AIDS Programs and Policy, the Mental Health Liaison for the Health Services Administration in the Office of Clinical Affairs and Affiliations, and as Director of Board Relations during his last three years with the County. Before joining the County in 2001, Mr. Seidel directed health and social services programs for many years in community-based organizations. He served as Founder and Executive Director of the Family AIDS Institute in Salvador, Brazil, and as Director of HIV Services at Tarzana Treatment Centers in Los Angeles County.
4 Essential Attributes of a High-Quality System of Care for Adults with Complex Care Needs

1. Each individual’s range of needs and goals, both medical and non-medical, as well as for family/caregivers, are identified and re-evaluated on an ongoing basis to drive care plans.

2. Each individual’s needs are addressed in a compassionate, meaningful, and person-focused way and incorporated into a care plan that is tailored, safe, and timely.

3. Individuals have a cohesive, easily navigable delivery system so that they can get the services and information they want by themselves or with support when needed, and avoid the services they do not need or want.

4. Individuals and their family/caregivers continually inform the way the delivery system is structured to ensure that it is addressing their needs and providing resources tailored to them.
The state is refining the Coordinated Care Initiative (CCI) in response to survey findings from the Field Research Corporation and the University of California, Berkeley. This session will center on telephone survey results, interviews with local organizations and stakeholders, and next steps in the demonstration. Get insights on what is working well and what improvements are needed to achieve the goals of the CCI for Californians with both Medicare and Medi-Cal.

**Panelists:**

Sarah Brooks  
Deputy Director, Health Care Delivery Systems  
California Department of Health Care Services

Mark DiCamillo  
Senior Vice President  
Field Research Corporation

Carrie Graham, PhD, MGS  
Assistant Director of Research  
Health Research for Action  
University of California, Berkeley

**Moderator:**  
Stephanie Gibbs, JD  
Senior Program Officer  
Center for Health Care Strategies
Sarah Brooks serves as the Deputy Director for Health Care Delivery Systems at the California Department of Health Care Services, where she has been Chief of the Managed Care Quality and Monitoring Division since 2014 and served as chief of the Program Monitoring and Medical Compliance Branch from 2012-2014. Before that, she worked for the California Association of Public Hospitals and Health Systems as the Assistant Director of Policy. Earlier in her career, Ms. Brooks worked for four years for the Indiana Legislative Services Agency, Office of Fiscal and Management Analysis as a Program/Fiscal Analyst.

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Mark DiCamillo is Senior Vice President of Field Research Corporation and Director of The Field Poll, a non-partisan, media-sponsored survey of California public opinion. Mr. DiCamillo has directed hundreds of large-scale research projects in California for government agencies, academic institutions, foundations, non-profit organizations, and others. Over the past 10 years, he has directed scores of large-scale surveys on health and health policy for state and local health departments, schools of public health, foundations and non-profit organizations. Since 2014 Mr. DiCamillo has directed the Rapid Cycle Polling Project for The SCAN Foundation, an ongoing tracking survey of the state’s dual Medicare and Medi-Cal beneficiaries enrolled in Cal MediConnect to evaluate their transition to the new program.
Carrie Graham, PhD, MGS, holds faculty appointments at the University of California, Berkeley School of Public Health and the University of California, San Francisco Institute for Health and Aging. She is the Principal Investigator of several studies examining the experiences and choices of older adults and people with disabilities who are transitioning to Medi-Cal managed care plans, including most recently an evaluation of California’s dual financial alignment demonstration. Dr. Graham has been working in the field of health services and aging research for 20 years.

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Stephanie Gibbs, JD, is a Senior Program Officer at the Center for Health Care Strategies (CHCS), where she works on initiatives related to managed long-term services and supports and integrating care for individuals dually enrolled in Medicare and Medicaid. Prior to joining CHCS, Ms. Gibbs served as the Director of Advocacy for UnitedHealthcare Community & State, where she focused on stakeholder engagement initiatives for older adults and people with disabilities and policy considerations for government programs, and as in-house counsel for a nursing home management company.
California’s Legislative Analyst’s Office (LAO) offers groundbreaking research predicting life trajectories and disability among California’s older adult population through 2060 using micro-simulation modeling. This session will provide the LAO’s initial findings, revealing rapid growth, changing demographics, and related service needs of California’s 65+ population. A responder panel with audience participation will discuss the implications of these findings on the state’s current and future system capacity, the financial impact, and the need for state-level planning.

**Panelists:**

Amber Didier  
Senior Fiscal and Policy Analyst  
Legislative Analyst’s Office

Callie Freitag  
Fiscal and Policy Analyst  
Legislative Analyst’s Office

**Reactor Panel:**

Adam Dorsey  
Assistant Program Budget Manager  
California Department of Finance

Elsa Quezada  
Executive Director  
Central Coast Center for Independent Living
Edie Yau
Director, Diversity and Inclusion
Alzheimer’s Association, Northern California & Northern Nevada Chapter

**Moderator:** Sandra F. Fitzpatrick, MA
Executive Director
California Commission on Aging

NOTES:
Amber Didier is a Senior Fiscal and Policy Analyst at the California Legislative Analyst’s Office (LAO) where she focuses on fiscal and policy issues related to Medi-Cal. Prior to working at the LAO, she worked at the RAND Corporation. Her work at RAND included a variety of health-related projects, such as developing an improvement measure for the Medicare Advantage STAR ratings program and evaluating health care providers’ decisions around influenza vaccination.

Callie Freitag is a Fiscal and Policy Analyst at the California Legislative Analyst’s Office, which provides nonpartisan, independent advice and analysis to the state Legislature. Ms. Freitag covers budget and program areas related to aging and long-term care, including In-Home Supportive Services (IHSS), Supplemental Security Income/State Supplementary Payment (SSI/SSP), Adult Protective Services, the Department of Aging, and the Department of Veterans Affairs. Prior to the LAO, she worked in the budget office of the U.S. Department of Health and Human Services.
Adam Dorsey is the Assistant Program Budget Manager for health programs at the California Department of Finance. He advises the Administration on health care related fiscal policy. He is responsible for departments including the Department of Health Care Services, the Department of Managed Health Care, the Office of Statewide Health Planning and Development, the California Health Facilities Financing Authority, and the California Health Benefits Exchange (Covered California). Prior to his work with the Department of Finance, Mr. Dorsey served as the Assistant Secretary at the California Health and Human Services Agency and worked at the California Medical Association.

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Elsa Quezada has been Executive Director of the Central Coast Center for Independent Living (CCCIL) located in Salinas, California since 1993. She manages an annual budget of $1.4 million and 18 employees. Ms. Quezada has been working in the independent living field since 1982 initially beginning her career as Executive Director of the first bilingual/bicultural independent living center in California, located in East Los Angeles. She has served on numerous local, state and national advisory committees with a special interest in developing independent living services for Latinos with disabilities.
Edie Yau is the Director of Diversity and Inclusion for the Alzheimer’s Association, Northern California and Northern Nevada Chapter. With the Alzheimer’s Association since 1999, Ms. Yau designs Chapter outreach and develops strategies for diversity and inclusion. She has a Master of Arts degree in Gerontology. Most recently, Ms. Yau was appointed to the California Task Force on Family Caregiving. Prior to her work at the Alzheimer’s Association, she worked at a senior services agency as a case manager and later as a program manager in San Francisco.

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Sandra F. Fitzpatrick, MA
Executive Director
California Commission on Aging
SFitzpatrick@CCoA.ca.gov

Sandra Fitzpatrick, MA, has 37 years of experience in the administration, development, and evaluation of older adult and volunteer services with an expertise in rural service delivery. Since 2004, she has been the Executive Director of the California Commission on Aging. Her work at the Commission has included advancing the cause of elder justice, taking a lead role in helping the state understand the implications of Medi-Cal Managed Care expansion to rural counties, promoting community-based services transformation through a multi-year senior center initiative, and shining the spotlight on older women and economic insecurity. Ms. Fitzpatrick worked with the Governor’s office to coordinate California’s White House Conference on Aging delegation in 2005.
Getting Person-Centered Care to Get Results

Person-centered Care supports quality of life and health outcomes for older adults, but is there a return on investment (ROI) for the groups putting it into practice? This session will exhibit The SCAN Foundation’s ROI tool—developed to help organizations make the business case for their programs. Learn about key economic drivers and programmatic assumptions, and see the tool in action with GRACE Team Care.

**Panelists:**

Dawn Butler, MSW, JD  
Director  
GRACE Training and Resource Center  
Indiana University School of Medicine

Eric Thai, CPA, MBA  
Director of Finance  
The SCAN Foundation

**Moderator:**  
Erin Westphal, MS  
Program Officer  
The SCAN Foundation
Dawn Butler, MSW, JD, began her social work career in long-term care. She was one of the first social workers to join the original GRACE program at Eskenazi Health (formerly Wishard Health Services) and served in this capacity for seven years. Upon completing her Juris Doctorate, Ms. Butler worked for a general practice firm before returning to IU Geriatrics in 2012 to serve as the Director of the newly established GRACE Training and Resource Center. As Director, Ms. Butler designs, implements, and coordinates dissemination and training programs to prepare health care professionals and organizations to implement GRACE Team Care.

Eric Thai, CPA, MBA, is the Director of Finance for The SCAN Foundation. He is responsible for managing the Foundation’s accounting and finance functions. Mr. Thai joined the Foundation from the SCAN Health Plan, where he conducted operational audits as a Senior Internal Auditor. He has also worked as a Senior Assurance Auditor for Ernst & Young, LLP. He has experience in various industries including: medical device, pharmaceutical, health care services, not-for-profit, manufacturing, retail, and asset management.
Erin Westphal, MS, serves as a Program Officer for The SCAN Foundation. Ms. Westphal’s work focuses on building the business case for person-centered care models and integrating care and financing for medical and social services. Prior to joining the Foundation, she was the Special Project Coordinator for the City of Los Angeles Department of Aging. In this role, she developed community-based programs for older adults and caregivers in the City of Los Angeles. Additionally, she has served as Director of Research for the Beverly Foundation and Project Coordinator for the Orange County Elder Abuse Forensic Center.

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November is fast approaching. Our closing speaker will outline ways for LTSS advocates and providers to prepare to engage with policymakers during an Administration transition and keep person-centered care at the forefront of conversation.

Robert Blancato
President
Matz, Blancato and Associates
RBlancato@MatzBlancato.com
@MatzBlancato

Robert Blancato is the President of Matz, Blancato and Associates, located in Washington, D.C. He is the National Coordinator of the bipartisan 3,000-member Elder Justice Coalition and also serves as the Executive Director of the National Association of Nutrition and Aging Services Programs. Mr. Blancato has more than 20 years of service in the congressional and executive branches, including Senior Staff of the U.S. House Select Committee on Aging and an appointment by President Clinton to be Executive Director of the 1995 White House Conference on Aging, one of four Conferences he has participated in. His volunteer leadership includes currently serving as the Chair of the Board of the American Society on Aging, and on the Board of AARP and the National Council on Aging. In September 2015, Mr. Blancato was appointed to the Advisory Panel on Outreach and Education of the Centers for Medicaid & Medicare Services.
**COMMONLY USED ABBREVIATIONS**

**Long-Term Services & Supports**

Commonly Used Abbreviations

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~ A ~

**AAA**
Area Agency on Aging

**ACA**
Patient Protection and Affordable Care Act

**ACL**
Administration for Community Living

**ACO**
Accountable Care Organization

**ADHC**
Adult Day Health Care (see CBAS)

**AoA**
Administration on Aging

**APN**
Advanced Practice Nurse

~ B ~

**BH**
Behavioral Health

**ADRC**
Aging and Disability Resource Centers
(C = “Connections” in California)

~ C ~

**CBAS**
Community-Based Adult Services (see ADHC)

**CB-CME**
Community-Based Care Management Entities

**CBO**
Community-Based Organization

**CC**
Care Coordination/Care Coordinators

**CCI**
Coordinated Care Initiative

**CCRC**
Continuing Care Retirement Community

**CCTP**
Community-Based Care Transitions Program
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>CDA</td>
<td>California Department of Aging</td>
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<tr>
<td>CDC</td>
<td>Centers for Disease Control and Prevention</td>
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<tr>
<td>CHHS</td>
<td>California Health and Human Services Agency</td>
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<tr>
<td>CM</td>
<td>Care Management or Care Manager</td>
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<tr>
<td>CMC</td>
<td>Cal MediConnect</td>
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<tr>
<td>CMMI</td>
<td>Center for Medicare and Medicaid Innovation</td>
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<tr>
<td>CMS</td>
<td>Centers for Medicare and Medicaid Services</td>
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<tr>
<td>COHS</td>
<td>County-Organized Health System</td>
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<tr>
<td>CPOs</td>
<td>Care Plan Options</td>
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<tr>
<td>CTI</td>
<td>Care Transitions Intervention</td>
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<tr>
<td>DDS</td>
<td>California Department of Developmental Services</td>
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<td>DHCS</td>
<td>California Department of Health Care Services</td>
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<td>DME</td>
<td>Durable Medical Equipment</td>
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<tr>
<td>D-SNP</td>
<td>Dual Eligible Special Needs Plan</td>
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<tr>
<td>DSS</td>
<td>California Department of Social Services</td>
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<tr>
<td>ER</td>
<td>Emergency Room</td>
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<tr>
<td>ED</td>
<td>Emergency Department</td>
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<td>FDA</td>
<td>Food and Drug Administration</td>
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</table>
COMMONLY USED ABBREVIATIONS

FFS
Fee-for-Service

FMAP
Federal Medical Assistance Percentages

FQHC
Federally Qualified Health Center

G

GMC
Geographic Managed Care

GRACE
Geriatric Resources for Assessment and Care of Elders

H

HCO
Health Care Options

HCBS
Home- and Community-Based Services

HEDIS
Healthcare Effectiveness Data and Information Set

HH
Health Homes

HHP
Health Homes Program

HHS
U.S. Department of Health and Human Services

HMO
Health Maintenance Organization

HRA
Health Risk Assessment

HRSA
Health Resources and Services Administration

HUD
U.S. Department of Housing and Urban Development

ICF
Intermediate Care Facility

ICP
Individual Care Plan

ICT
Interdisciplinary Care Team

IHS
Indian Health Service
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<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>IHSS</td>
<td>In-Home Supportive Services</td>
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<td>ILC</td>
<td>Independent Living Center</td>
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<td>IOPCM</td>
<td>Intensive Out-Patient Care Management</td>
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<td>KI</td>
<td>Key Informant</td>
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<tr>
<td>LTC</td>
<td>Long-Term Care</td>
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<tr>
<td>LTSS</td>
<td>Long-Term Services and Supports</td>
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<tr>
<td>MBHO</td>
<td>Managed Behavioral Health Organization</td>
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<tr>
<td>MCO</td>
<td>Managed Care Organization</td>
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<tr>
<td>MFP</td>
<td>Money Follows the Person (called Community Transitions in California)</td>
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<tr>
<td>MLR</td>
<td>Medical Loss Ratio</td>
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<tr>
<td>MLTSS</td>
<td>Managed Long-Term Services and Supports</td>
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<tr>
<td>MMC</td>
<td>Medicaid Managed Care</td>
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<td>MMCO</td>
<td>Medicare-Medicaid Coordination Office</td>
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<td>MSSP</td>
<td>Multi-Purpose Senior Services Program</td>
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<tr>
<td>NCM</td>
<td>Nurse Care Manager</td>
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<td>NCQA</td>
<td>National Committee for Quality Assurance</td>
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<td>NORC</td>
<td>Naturally Occurring Retirement Community</td>
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<tr>
<td>NQF</td>
<td>National Quality Forum</td>
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COMMONLY USED ABBREVIATIONS

~ O ~

OAA
Older Americans Act

Opt-Out
People eligible for Cal MediConnect who choose not to enroll into the program

~ P ~

PACE
Program of All-Inclusive Care for the Elderly

PCC
Person-Centered Care

PCP
Primary Care Physician

PPO
Preferred Provider Organization

PRIME
Public Hospitals Redesign and Incentives in Medi-Cal

~ R ~

RCFE
Residential Care Facilities for the Elderly

RN
Registered Nurse

RM
Ranking Member

ROI
Return on Investment

~ S ~

SAMHSA
Substance Abuse and Mental Health Services Administration

SNP
Special Needs Plan

SSA
Social Security Administration

SSI
Supplemental Security Income

SSI/SSP
Supplemental Security Income/ State Supplementary Payment
SW
Social Worker

~ T ~

TSF
The SCAN Foundation

~ W ~

WPC
Whole Person Care

NOTES:
The SCAN Foundation thanks our speakers and the many partners who made the 2016 Summit a success.

**ACCESSIBILITY**
Brenda Premo

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(888) 569-7226

Info@TheSCANFoundation.org

@TheSCANFndtn

The SCAN Foundation
The SCAN Foundation is a non-profit public charity that envisions a society where older adults can access health and supportive services of their choosing to meet their needs. Our mission is to advance a coordinated and easily navigated system of high-quality services for older adults that preserve dignity and independence.