

# Driving Change

## The SCAN Foundation's First 10 Years



Photo by Kristin Chalmers for Community Catalyst

2018  
**Annual Report**



# 2018 Annual Report

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## Vision

A society where older adults can access health and supportive services of their choosing to meet their needs

## Mission

To advance a coordinated and easily navigated system of high-quality services for older adults that preserve dignity and independence

## Our Thematic Goals

**Medicare-Medicaid Integration:** Integrate care and financing for vulnerable, low-income older adults

**Person-Centered Care:** Support models of care that value dignity, choice, and independence by putting individuals and their families at the center of the decision-making process

**Long-Term Care Financing:** Provide working families with tools to help pay for their future care needs

# Message from the Board Chair & President

Welcome to The SCAN Foundation's 2018 Annual Report. This is a very special year for us, marking the 10th anniversary of our efforts to ensure that all older Californians have the opportunity to age with dignity, choice, and independence in the place they call home. As we reflect on the last 10 years, we take pride in the excellent work of our many grantees, partners, colleagues, and friends. The good news is the needle is moving, the environment for aging is improving, and there is a much clearer understanding about the challenges that lie ahead. That said, we remain extremely restless because the rate of change is not fast enough, is often too incremental, and glosses over those most in need.

In this annual report, we highlight important progress during our first decade of driving change. We also recommit ourselves to transforming care for older adults. As we look forward, we envision dramatically more person-centered care, and extremely better choices that empower and strengthen the lives of older adults—all potentiated by refreshed and more forward looking public policy. We aren't designing for somebody else. We are designing for ourselves, our families, and our communities—now and for the future.

Join us! We welcome you into this work!

Sincerely,



**Jennie Chin Hansen, RN, MS, FAAN**  
*Board Chair, 2018*



**Bruce Chernof, MD**  
*President & CEO*





**Our First Decade of  
DRIVING CHANGE**

# DRIVING CHANGE

## Through Person-Centered Care

The American Geriatrics Society formally **defined person-centered care**, launching a fresh approach for meeting the individual needs of older adults through policy & program efforts



Health system leaders, community-based organizations & others from the public & private sectors adopted this new approach

The 1<sup>st</sup> **ROI Calculator** was developed to promote health sector/CBO partnerships

To date, it's been downloaded 1,600+ times



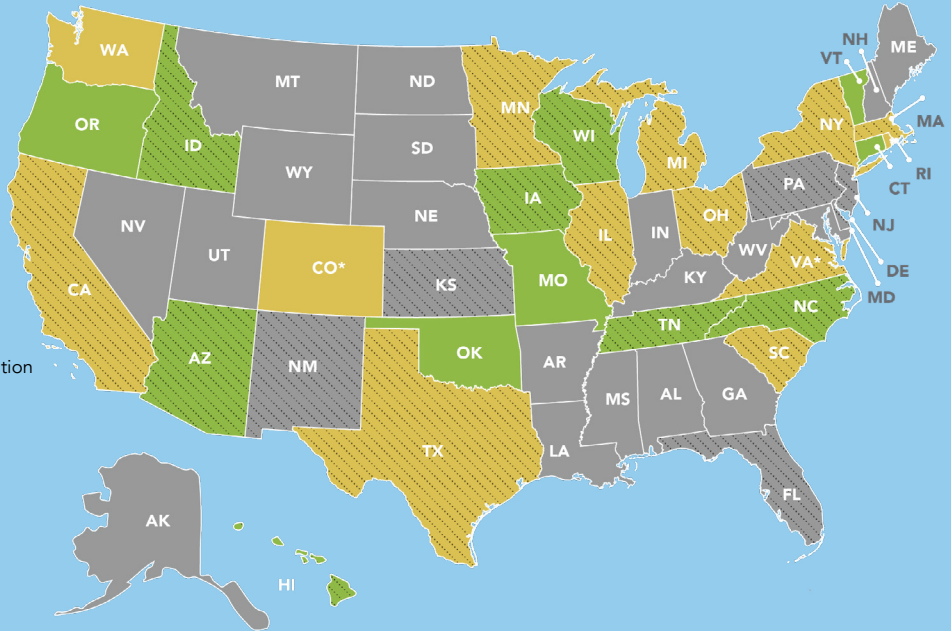


# DRIVING CHANGE

## Through Better Options for Older Adults with Complex Needs

25 states are actively transforming their Medicaid systems to help vulnerable older adults

- Explored Launching Duals Demonstration
- Demonstration Launched
- MLTSS Program



The Bipartisan Policy Center **recommendations** informed the 2018 *CHRONIC Care Act*, a **landmark new law** to advance person-centered, coordinated care for Medicare beneficiaries & those with Medicare + Medicaid

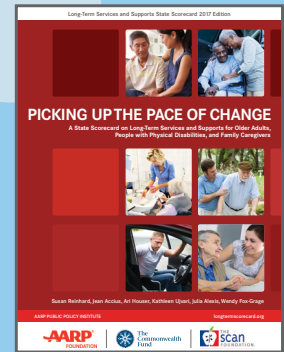
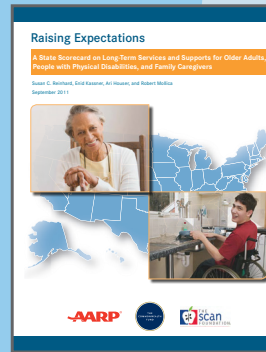
We're collaborating with 5 leading foundations on a major goal: By 2020, 30% of Medicare Advantage plans & Accountable Care Organizations will adopt a model of care to best serve adults with complex needs

- The Commonwealth Fund
- The John A. Hartford Foundation
- Milbank Memorial Fund
- Peterson Center on Healthcare
- Robert Wood Johnson Foundation
- The SCAN Foundation

# DRIVING CHANGE

## Through Person-Focused, Quality Measurement

AARP published 3 LTSS State Scorecards to measure state performance over time in achieving high-quality systems of care



Building from the Scorecards, we debuted the **Pacesetter Prize** to celebrate trailblazing states for improving LTSS across 4 domains

We supported the 1<sup>st</sup> set of quality measures & accreditation tools to hold systems accountable for helping people achieve what's most important to them





# DRIVING CHANGE

## Through Championing Older Californians

Governor-elect Newsom committed to developing and implementing a **Master Plan for Aging**



A dynamic network of 21 county-based **Regional Coalitions** advocated for LTSS

Over 1,500 organizations participated, covering nearly 95% of the state

Supporting integration across Medicare & Medi-Cal through the 7-county duals demonstration, we've **surveyed almost 10,000 beneficiaries** about their experiences in the Cal MediConnect program



We launched **My Care, My Choice** to help Californians learn about the range of care options in their local area so they can get the most from their health care coverage

# DRIVING CHANGE

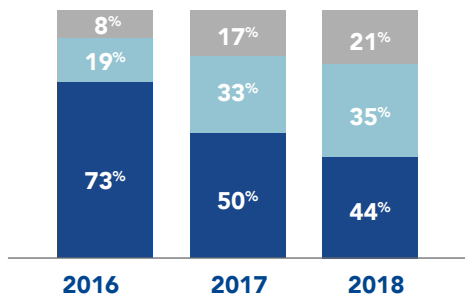
## Through Communications Engagement

We jumpstarted & normalized media engagement around aging & LTC

Grants produced nearly 2,000 items across print, TV & digital platforms, resulting in 5.6 billion impressions



Episodes With Older Adults (65+) in Speaking Roles



● 0 older adults ● 1 older adult ● 2+ older adults

Almost  $\frac{3}{4}$  of 2016 storylines had no speaking roles for older adults

Following work with Hollywood, Health & Society, more than half of 2018 shows (like a storyline in *General Hospital*) had 1 or more central older characters

We expanded the visibility of TSF leadership & initiatives at high-profile venues



ASPEN IDEAS FESTIVAL







Photo by Kristin Chaimers for Community Catalyst

## Grants List: Thematic Goal 1

### ***My Care, My Choice* Website Development and Dissemination**

#### **PROJECT6 DESIGN, INC**

\$180,345

#### **GRETCHEN ADDI DESIGN**

\$157,800

#### **HARBAGE CONSULTING, LLC**

\$112,000

#### **MCCABE MESSAGE PARTNERS**

\$35,000

#### **INSTITUTE FOR ACCOUNTABLE CARE / NATIONAL ASSOCIATION OF ACOS**

\$18,816

12 months

This project created the *My Care, My Choice* website, a consumer decision resource to help Californians with Medicare and Medi-Cal locate and better understand their health coverage options.

### **Community of Constituents**

#### **California Collaborative for Long-Term Services and Supports**

MILDRED CONSULTING AND ADVOCACY

\$178,008

#### **Community Living Implementation Council: Aging and Disability Resource Connection (ADRC) of Nevada County**

FREED/ADRC OF NEVADA COUNTY

\$10,000

## Grants List: Thematic Goal 1 *(continued)*

### **Diversability Advocacy Network (DAN)**

DISABILITY ACTION CENTER

\$10,000

### **Inland Empire Long-Term Services and Supports Coalition**

COMMUNITY ACCESS CENTER

\$10,000

### **Los Angeles Aging Advocacy Coalition (LAAAC)**

ST. BARNABAS SENIOR CENTER OF LOS ANGELES

\$10,000

### **Monterey Bay Aging and Disability Resource Connection**

SENIORS COUNCIL OF SANTA CRUZ AND SAN BENITO COUNTIES

\$10,000

### **Aging Services Collaborative (ASC) of Santa Clara County**

SILICON VALLEY COUNCIL OF NONPROFITS

\$10,000

### **San Francisco Long-Term Care Coordinating Council**

HOMEBRIDGE

\$10,000

### **Central Valley Long-Term Services and Supports Coalition**

AGEWELL FRESNO

\$9,000

### **Long-Term Services and Supports Workgroup of Kern County**

INDEPENDENT LIVING CENTER OF KERN COUNTY

\$9,000

### **Contra Costa County Advisory Commission on Aging**

CHOICE IN AGING

\$8,000

### **Aging and Disability Coalition**

DISABILITY SERVICES AND LEGAL CENTER

\$5,000

### **Aging and Disability Resource Connection Placer County**

AREA 4 AGENCY ON AGING

\$5,000

### **Bay Area Senior Health Policy Coalition**

ON LOK SENIOR HEALTH SERVICES

\$5,000

## Grants List: Thematic Goal 1 *(continued)*

### **Central Coast Long-Term Services and Supports Coalition**

INDEPENDENT LIVING RESOURCE CENTER, INC

\$5,000

### **Increasing Access to Community-Based Services Through Collaboration, Education and Advocacy**

YOLO HEALTHY AGING ALLIANCE

\$5,000

### **New Beginning Coalition**

SAN MATEO COUNTY AGING AND ADULT SERVICES

\$5,000

### **Orange County Aging Services Collaborative**

ALZHEIMER'S ORANGE COUNTY

\$5,000

### **Senior Coalition of Stanislaus County**

HEALTHY AGING ASSOCIATION

\$5,000

### **Senior Services Coalition of Alameda County**

ALAMEDA COUNTY MEALS ON WHEELS

\$5,000

### **Ventura County Hospital to Home Alliance**

CAMARILLO HEALTH CARE DISTRICT

\$5,000

12 months

The Community of Constituents initiative is a statewide movement made-up of the Sacramento-based California Collaborative for Long-Term Services and Supports and 20 Regional Coalitions. With over 1,000 member organizations and more than 300 affiliated members, the Initiative worked to transform the system of long-term care so that all Californians can age with dignity, choice, and independence.

## Grants List: Thematic Goal 1 *(continued)*

### ***We Stand With Seniors Campaign***

#### **PERRY COMMUNICATIONS GROUP**

\$275,000

#### **EMOTA**

\$10,500

10 months

This project launched the *We Stand With Seniors* campaign to communicate with California gubernatorial candidates on the need for a Master Plan for Aging. It was co-funded with West Health.

### **Demonstration of Person-Driven Outcome Measures for an Age-Friendly Health System**

#### **NATIONAL COMMITTEE FOR QUALITY ASSURANCE**

\$606,768

24 months

This project tested the first person-centered quality measurement system suitable for value-based payment arrangements in Medicare and Medicare-Medicaid health plans.

### **Strengthening Long Term Services and Supports (LTSS) in a New Policy Environment through a State Medicaid LTSS Reform Toolkit – Phase II**

#### **CENTER FOR HEALTH CARE STRATEGIES**

\$351,481

15 months

Co-funded with the Milbank Memorial Fund, this project provided technical assistance and convened a learning laboratory for eight states and the District of Columbia to develop new Medicaid waivers using the State Medicaid LTSS Reform Toolkit.

### **Cal MediConnect Evaluation: Continuation of Data Analysis**

#### **THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, SAN FRANCISCO**

\$74,676

12 months

This project provided extended analysis and reporting on the experience of California's Medicare-Medicaid population, utilizing evaluation data collected through a multiyear beneficiary survey.



## Grants List: Thematic Goal 1 *(continued)*

### **2018 Summit Logistics Partner**

KALINA INSTITUTE

\$72,690

8 months

This project provided logistic and vendor support for the annual California Summit on Long-Term Services and Supports.

### **Duals Symposium and Ombudsman Learning Collaborative**

COMMUNITY CATALYST - CENTER FOR CONSUMER ENGAGEMENT IN HEALTH INNOVATION

\$70,000

10 months

This project hosted a national symposium on the lessons learned from the first five years of the federal Financial Alignment Initiative and discussed the future of integrated care for Americans with Medicare and Medicaid. The project was co-funded with The Commonwealth Fund, The John A. Hartford Foundation, the Milbank Memorial Fund, and the Peterson Center on Healthcare.

### **Amplifying Aging Issues in the 2018 CA Gubernatorial Election: A GIA Conference Plenary Session**

GRANTMAKERS IN AGING

\$25,000

8 months

This project shared best practices to national and regional funders about how philanthropy can foster communications during an election cycle to elevate aging, family caregiving, and long-term care issues.

### **California Legislative Staff Education Institute**

POLICY IMPACT

\$15,000

6 months

This project developed and disseminated aging content within the California Legislative Staff Education Institute curriculum, reaching more than 30 legislative leaders and consultants.

### **Blueprint for Health Care and CBO Partnerships**

CHAPMAN CONSULTING, LLC

\$14,500

4 months

This project supported the development of a blueprint for health plans on integrating services with community-based organizations (CBOs).



## Grants List: Thematic Goal 2

### **Advancing Action: A State Scorecard on LTSS for Older Adults, People with Physical Disabilities, and Family Caregivers, 2020**

AARP FOUNDATION

\$417,600

29 months

This project led the development of the 2020 Long-Term Services and Supports State Scorecard.

### **Environmental Scan of Person-Centered Care in California**

AVALERE HEALTH, LLC

\$300,000

8 months

This project reviewed the California health care environment to assess access to person-centered models of care for Medicare beneficiaries.

### ***Do YOU give a care?* Campaign**

MCCABE MESSAGE PARTNERS

\$120,000

ASSOCIATED PRESS: NATIONAL OPINION RESEARCH CENTER

\$7,500

9 months

This project launched *Do YOU give a care?*—a communications campaign to identify and amplify the role that more than 10 million millennials serve as family caregivers.

## Grants List: Thematic Goal 2 *(continued)*

### **Creating Age-Friendly Health Systems: What Matters? Toolkit**

INSTITUTE FOR HEALTHCARE IMPROVEMENT

\$134,212

24 months

This project developed an online toolkit to foster transformation of health systems to provide care based on what is important to the person.

### **Resilience Lab Development**

#### **BIRSEL + SECK**

\$78,750

4 months

This project developed a pilot to unpack the four worries (i.e., income insecurity, retirement and disconnection, shift in health, and a family break) with end users to inform a follow-on, two-year research project.

#### **GRETCHEN ADDI DESIGN**

\$61,050

4 months

This project conducted research and numerous interviews with entrepreneurs, start-ups, venture capitalists, and older adults in preparation for the TSF Resilience Lab.

### **Resilience Lab Design**

#### **BIRSEL + SECK**

\$20,000

#### **INNOVATION DEVELOPMENT INSTITUTE**

\$20,000

#### **IDEAS42**

\$20,000

#### **MIT AGELAB**

\$20,000

## Grants List: Thematic Goal 2 *(continued)*

### **IDEO LP**

\$20,000

4 months

This project invited five human-centered design firms to develop their concept for a TSF Resilience Lab.

### **Hospital Care Excellence Program**

CALIFORNIA STATE UNIVERSITY SAN MARCOS FOUNDATION

\$100,000

12 months

This project developed tailored person-centered trainings for hospital discharge planners. The project was co-funded by California Health Care Foundation; Workforce Investment Boards of Orange, Riverside and San Bernardino, and Los Angeles and Ventura counties; California Hospital Association; and Kaiser Northern California Community Benefit.

### **Building the Business Case for Creating Age-Friendly Health Systems**

INSTITUTE FOR HEALTHCARE IMPROVEMENT

\$80,490

12 months

This project developed the business case for Age-Friendly Health Systems, and return on investment (ROI) calculators for interventions that support implementation of each of the “4Ms” of an Age-Friendly Health System: medication, mentation, mobility, and what matters.

### **Implementation and Scaling of High-Need, High-Cost Patient Initiatives in Accountable Care Organizations (ACOs)**

INSTITUTE FOR ACCOUNTABLE CARE

\$74,081

6 months

This project convened an advisory group of ACO leaders to identify models of care for complex populations best positioned for implementation in the ACO environment.



## Grants List: Thematic Goal 2 *(continued)*

### **Better Care Playbook: Phase III**

INSTITUTE FOR HEALTHCARE IMPROVEMENT

\$63,000

12 months

This project supported the ongoing curation and dissemination of resources for the Better Care Playbook to provide better care to complex populations. The project was co-funded by The Commonwealth Fund, The John A. Hartford Foundation, Peterson Center on Health Care, and the Robert Wood Johnson Foundation.

### **Defining the Parameters for Two Evidence-Based Program Pilots for Special Needs Population Cohorts**

SPECIAL NEEDS PLAN ALLIANCE, INC

\$33,228

7 months

This project convened five Special Needs Plans to determine the feasibility of implementing person-centered models of care for complex populations.

### **Forum of Aging, Disability, and Independence**

NATIONAL ACADEMY OF SCIENCES, ENGINEERING, AND MEDICINE

\$25,000

12 months

This project supported a forum to explore innovative policy and practical solutions to assist older adults and people with disabilities to live with dignity and independence.

### **Health Systems Change Initiative**

GROWTH PHILANTHROPY NETWORK, INC

\$25,000

15 months

This project convened experts to identify and explore opportunities to leverage change within the health care sector to improve the delivery of care for complex populations. The project was co-funded by California Health Care Foundation, Pritzker Pucker Family Foundation, Well Being Trust, and the Blue Shield of California Foundation.

## Grants List: Thematic Goal 2 *(continued)*

### **Building Care Solutions Conference**

PACIFIC BUSINESS GROUP ON HEALTH

\$23,650

8 months

This project supported the development of a two-day conference of California leaders in health care to discuss opportunities to further support implementation of person-centered models of care.

### **Creating the Business Case for Age-Friendly Health Systems**

VICTOR TABBUSH CONSULTING

\$23,600

7 months

This project supported the development of the business case for Age-Friendly Health Systems and return on investment (ROI) calculators for interventions which support implementation.

### **Integrating Social Needs Care into the Delivery of Health Care to Improve the Nation's Health**

NATIONAL ACADEMY OF SCIENCES, ENGINEERING, AND MEDICINE

\$20,000

18 months

This project established a consensus study of the potential for integrating services social needs into the delivery of health care in order to achieve better health outcomes.



## Grants List: Thematic Goal 3

### **Kaiser Health News Coverage of Aging and Long-Term Care**

HENRY J. KAISER FAMILY FOUNDATION

\$250,000

12 months

This project supported core digital coverage and video on aging and long-term care issues, including deeper dives into government programs and the effects of policy changes.

### **CHRONIC Care Act Implementation**

BIPARTISAN POLICY CENTER INC

\$228,532

12 months

This project convened stakeholders and elevated long-term care financing policy solutions at the federal level, specifically addressing ways to improve the availability of special supplemental benefits in Medicare Advantage and care integration for Medicare-Medicaid individuals. The project was co-funded with The Commonwealth Fund.

### **TEDMED 2018 Experience Partnership**

THE TEDMED FOUNDATION

\$200,000

9 months

This project showcased the topic of millennial caregiving at the annual TEDMED event in La Quinta, California.

## Grants List: Thematic Goal 3 *(continued)*

### **Developing the Business Case for Non-Medical Supplemental Benefits**

ANNE TUMLINSON INNOVATIONS, LLC

\$74,999

6 months

This project developed a business case for health plans and system leaders to offer new supplemental benefits as part of *CHRONIC Care Act* implementation.

### ***CHRONIC Care Act: Medicare Advantage Plans' Response to New Flexibility in Supplemental Benefits***

LONG-TERM QUALITY ALLIANCE

\$50,000

7 months

This project surveyed Medicare Advantage plans who responded to the 2019 CMS Plan Call Letter opportunity to offer flexible supplemental benefits to chronically ill beneficiaries.

### **Implementation of the *CHRONIC Care Act***

BIPARTISAN POLICY CENTER INC

\$44,980

9 months

This project hosted events focused on the *CHRONIC Care Act*, and produced a brief highlighting key decisions for the Centers for Medicare & Medicaid Services, health plans, states, and other stakeholders.

### **Surfacing Best Practices for States to Provide More Efficient and Effective Long-Term Care**

NATIONAL GOVERNORS ASSOCIATION CENTER FOR BEST PRACTICES

\$25,000

9 months

This project organized an expert roundtable of state leaders and national long-term services and supports experts to discuss promising solutions for states to improve care and reduce costs for their aging populations.



# Statements of Financial Position

## As of December 31, 2018, and 2017

	2018	2017
<b>ASSETS</b>		
<b>CURRENT ASSETS:</b>		
Cash and cash equivalents	\$3,906,442	\$5,926,674
Investments	201,344,241	216,704,664
Interest and dividend receivables	333,864	312,993
Prepaid expenses and other current assets	<u>10,673</u>	<u>2,372</u>
Total current assets	205,595,220	222,946,703
<b>PROPERTY AND EQUIPMENT—Net</b>	133,107	152,642
<b>INVESTMENTS</b>	729,665	913,937
<b>MISSION IMPACT INVESTMENTS</b>	999,998	999,998
<b>DEPOSITS AND OTHER ASSETS</b>	<u>18,072</u>	<u>18,072</u>
<b>TOTAL ASSETS</b>	<b>\$207,476,062</b>	<b>\$225,031,352</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>CURRENT LIABILITIES:</b>		
Accounts payable and accrued expenses	\$222,589	\$205,485
Accrued payroll and related benefits	627,854	607,808
Grants payable	1,266,434	1,918,876
Due to parent and affiliates	<u>12,600</u>	<u>35,687</u>
Total current liabilities	2,129,477	2,767,856
<b>DEFERRED COMPENSATION</b>	729,665	913,937
<b>DEFERRED RENT</b>	253,526	244,447
<b>GRANTS PAYABLE</b>	<u>726,255</u>	<u>361,552</u>
Total liabilities	3,838,923	4,287,792
<b>NET ASSETS—Without donor restrictions</b>	<u>203,637,139</u>	<u>220,743,560</u>
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$207,476,062</b>	<b>\$225,031,352</b>

## Statements of Activities

### As of December 31, 2018, and 2017

	2018	2017
<b>NET REVENUES—Investment income</b>	\$18,536,922	\$10,487,327
<b>OPERATING EXPENSES:</b>		
Grants and other program expense	8,467,309	6,863,102
General and administrative expense	1,441,673	1,539,122
Total operating expenses	<u>9,908,982</u>	<u>8,402,224</u>
<b>NET REALIZED INVESTMENT INCOME</b>		
<b>OVER OPERATING EXPENSES</b>	8,627,940	2,085,103
<b>CHANGE IN UNREALIZED (LOSS) GAIN ON</b>		
<b>INVESTMENTS—Net</b>	<u>(25,734,361)</u>	<u>20,102,179</u>
<b>INCREASE IN NET ASSETS</b>	(17,106,421)	22,187,282
<b>NET ASSETS—Beginning of year</b>	<u>220,743,560</u>	<u>198,556,278</u>
<b>NET ASSETS—End of year</b>	\$203,637,139	\$220,743,560

# 2018 Board of Directors

Jennie Chin Hansen, RN, MS, FAAN,  
*Chair*

Melanie Bella, MBA

Colleen Cain

Bruce A. Chernof, MD, FACP

Ivelisse R. Estrada

Tom Higgins

Francesca "Cesca" Ruiz De Luzuriaga

Cheryl Phillips, MD, AGSF

Carol Raphael, MPA

Patrick Seaver

Ryan M. Trimble, DDS, MBA

## Executive Staff



**Bruce A. Chernof,**  
**MD, FACP**  
*President &  
Chief Executive Officer*



**Gretchen E. Alkema,**  
**PhD**  
*Vice President  
Policy and Communications*



**René Seidel,**  
**Dipl. Soz. Paed. (FH)**  
*Vice President  
Programs and Operations*

## Program Staff



**Megan Burke, MSW**  
*Policy Analyst*



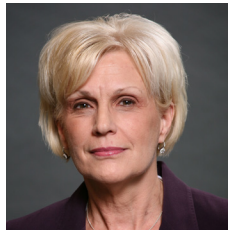
**Megan Juring**  
*Program Officer*



**Mari Nicholson, MHS**  
*Director of Communications*



**Kali Peterson, MS, MPA**  
*Program Officer*



**Karen Scheboth, MS**  
*Director of Grants Administration*



**Sarah S. Steenhausen, MS**  
*Senior Policy Advisor*



**Eric Thai, CPA, MBA**  
*Director of Finance  
and Mission Impact Investments*

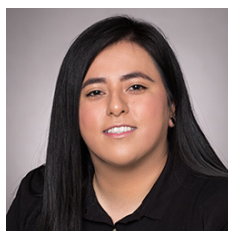


**Erin Westphal, MS**  
*Program Officer*

## Administrative Staff



**Gina Alferez**  
*Executive Assistant*



**Renata McElvany**  
*Program Associate*





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# 2018 Annual Report

