

2019 ANNUAL REPORT

# Maximizing Communications to Reach Strategic Audiences





## 2019 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 Goals

### **Transform care and delivery.**

Establish person-centered, integrated models as the gold standard of care that all older adults come to expect and receive—regardless of whether they have Medicare only, or are dually eligible for Medicare and Medicaid.

### **Build resilience and capacity.**

Inspire and enable entrepreneurs and innovators to design *with* older adults – not just for them – and create new offerings that embrace the beauty of life as we age.

### **Drive responsive financing policies.**

Support and encourage responsive federal and state financing policies to create meaningful care choices for older adults of today and tomorrow.

# Message from our Board Chair & President & CEO

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Welcome to The SCAN Foundation's 2019 Annual Report—our yearly review of funded work to ensure that all older persons, especially those in California, have the opportunity to age with dignity, choice, and independence in the place they call home.

Addressing challenges, recognizing strengths, and assuring authentic respect and engagement are crucial for effecting positive change. Indeed, we know our vision for older adults and families is strongest when everyone is included: when all members of society across race/ethnicities, cultures, and geographies recognize the aging they see in their own lives, share individual preferences for aging, and influence our Foundation's vision for aging well. The coronavirus pandemic along with the highlighting of racial inequities this spring have reminded us, too, that true community is critical. We are all interdependent, and it is through health care and government working with informed and involved communities that we will get through challenging times, and apply new lessons learned for a more dignified and respectful future.

In this year's report, we celebrate the power of communications to make a significant difference in the journey of impacting change. We focused on changing the narrative on aging by normalizing rather than stigmatizing it. We created space to hear about people's everyday experiences and needs. We highlighted person-first storytelling through web platforms, various media strategies, and digital content.

Finally, our deliberate use of communications as a critical tool to drive successful uptake and action sought to drive positive change that ultimately transforms care for older adults and families. We welcome you to our work!

Sincerely,



Jennie Chin Hansen, RN, MS, FAAN  
Board Chair, 2019



Bruce Chernof, MD  
President & CEO

# Maximizing Communications to Reach Strategic Audiences



# Elevating the Voices of Californians

In 2019, we led communications to ensure that momentum for the Master Plan for Aging was rooted in the experiences, needs, and preferences of older adults. Working with Greater Good Studio (GGS) and building on last year's successful *We Stand With Seniors* platform, efforts included workshops and other events, polling, and recommendations.

## EVENTS

20+

"DAY-IN-THE-LIFE"  
SESSIONS WITH  
OLDER ADULTS.



300+

PROVIDED INPUT.



*"The housing crisis is so bad. I've put in maybe 40-45 applications. ...The shortest waiting list is two years."*

**Jerome McIntosh**  
Alameda County

A  
TOTAL  
OF  
276

**POLICYMAKERS, MEDIA & STAKEHOLDERS** ATTENDED A FILM SCREENING & AGING POLICY DISCUSSION.



600,000+  
IMPRESSIONS

## RECOMMENDATIONS

RESEARCH SHOWED THAT **3** AREAS AFFECT OLDER ADULTS' ABILITY TO THRIVE. A REPORT SYNTHESIZED THIS INFORMATION FOR CALIFORNIA'S MASTER PLAN DEVELOPMENT.



**Physical Environment**



**Supportive Services**



**Social & Emotional Well-Being**

## POLLING



A MAJORITY OF CALIFORNIANS OF ALL AGES & BACKGROUNDS SUPPORT THE MASTER PLAN FOR AGING.

7 of 10

SAY CALIFORNIA SHOULD INVEST IN IMPLEMENTATION OF THE MASTER PLAN.



# Supporting California's Master Plan for Aging

We joined with philanthropic partners to support California's development of a [Master Plan for Aging](#). This partnership established a joint fund to assist the state with research, policy development, stakeholder outreach, and strategic communications. With this support, the state launched its comprehensive engagement efforts to inform the Master Plan, which will serve as a blueprint for all Californians to age with dignity and independence.

## PARTNERS



### Added in 2020



## HOW THE FUND IS BEING USED



2019 FUNDS RAISED  
**\$640,000**  
FUNDS COMMITTED  
**\$560,198**



Policy Development



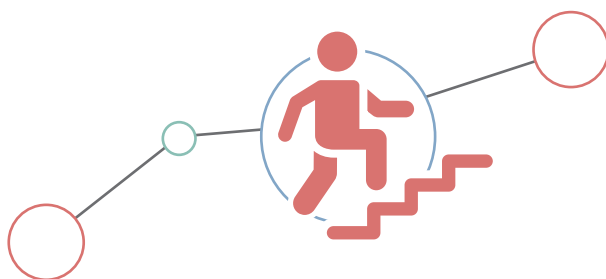
Research and Data Analytics



Strategic Communications



Stakeholder Engagement



## NEXT STEPS

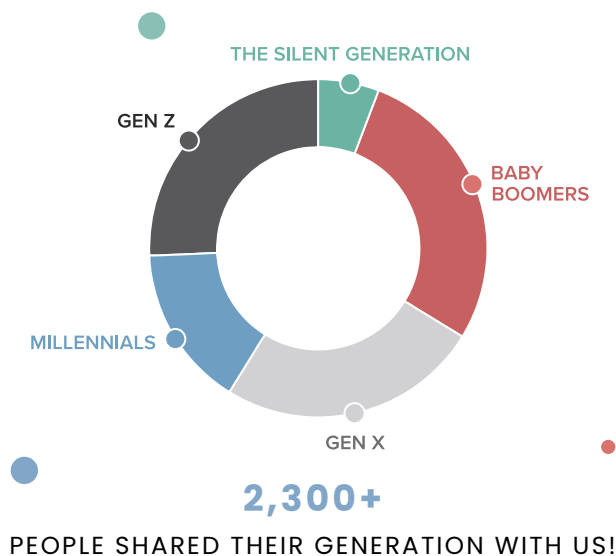
The state is poised to release the Master Plan in late 2020.

# Changing the Narrative on Aging at the 131<sup>st</sup> Rose Parade



Older adults seeking to age well in the place they call home often rely on family caregivers from all ages. We recognized them at the 2020 Tournament of Roses® through our float, *Hopes Heroes: Honoring Caregivers of All Generations*. We created an imaginative take on “my home is my castle” and included riders representing caregivers of all generations. We amplified caregiving stories and what Americans want for their own aging.

FAMILY CAREGIVERS COME IN ALL AGES, AND SO DO ROSE PARADE-GOERS!



NEARLY  
**1800% INCREASE**  
IN WEB TRAFFIC ON PARADE DAY!



MORE THAN  
**37K VIDEO VIEWS**  
ACROSS OUR WEBSITE  
AND SOCIAL MEDIA



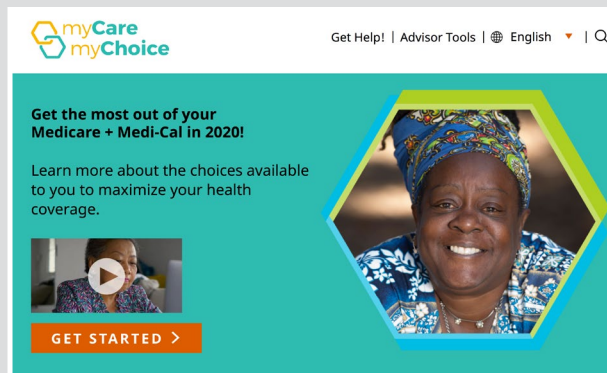


# Enhancing *My Care, My Choice*

The *My Care, My Choice* web platform helps people with Medicare and Medi-Cal better understand the care options in their local area. In 2019, we added more language capabilities and upgraded the site to make it more user friendly. We also worked with a variety of partners to promote the tool across California.

## Version 2.0

- 4 Languages: English, Spanish, Traditional and Simplified Chinese
- Updated Advisor Tools
- Added videos



## Targeted Engagement

Digital ads drove

73%

of site users.

124,000  
Website Visits



## Strategic Outreach

Direct Reach



7,000  
Individuals

Indirect Reach



7,673,000  
Impressions



Univision  
Health Fairs



# Redesigning Our Website and Newsletter

In 2019, we fully updated our website and newsletter communication platforms by infusing them with person-first messaging and crafting a new, distinctive brand image. Our efforts aimed to improve the user experience, better explain the impact of our work, and drive audience engagement.





## GRANTS LIST:

# Thematic Goal 1

### ***My Care, My Choice – Version 2.0 Updates and Dissemination***

#### **HARBAGE CONSULTING**

\$250,000

12 months

#### **MCCABE MESSAGE PARTNERS**

\$242,000

17 months

#### **UNIVISION NETWORK**

\$200,000

10 months

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

\$84,890

24 months

#### **GRETCHEN ADDI DESIGN**

\$66,000

10 months

#### **TI HEALTH**

\$50,000

6 months

#### **INSTITUTE FOR ACCOUNTABLE CARE**

\$8,895

12 months

These projects enhanced and amplified dissemination of the *My Care, My Choice* [website](#) –an online decision resource to help Californians with Medicare and Medi-Cal identify health coverage options in their local area.

## California 2019 Master Plan for Aging Initiative

### **Supporting California in Developing a Master Plan for Aging**

#### **PASCHAL ROTH PUBLIC AFFAIRS, INC.**

\$157,500

9 months

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

\$109,384

6 months

#### **JENNIFER WONG**

\$100,000

6 months

#### **STEPHEN SOMERS AND ASSOCIATES, LLC**

\$60,313

7 months

#### **LEADING RESOURCES, INC.**

\$39,061

7 months

These projects were funded through the Master Plan for Aging Fund developed by six California foundations (see [page 7](#)). Specifically, grantees supported policy development for the Stakeholder Advisory Committee and the subcommittees, data gap analysis with recommendations, a statewide communications plan, and logistical needs for the process.

### **Human-Centered Design Workshops to Understand the Needs of California Older Adults**

#### **GREATER GOOD STUDIO**

\$299,850

8 months

This project sought to understand the lived experiences and unmet needs of California's older adults, and translate these learnings into a strategic recommendations report for consideration by the stakeholders developing California's Master Plan for Aging.

## **Maintaining Master Plan for Aging Momentum Among Consumers**

**PERRY COMMUNICATIONS GROUP**

\$150,000

11 months

This project, co-funded with West Health, amplified the *We Stand With Seniors* campaign during Governor Newsom's first 100 days in office and communicated about the Master Plan for Aging to policymakers, consumers, and the media.

## **Master Plan for Aging Forum**

**KALINA INSTITUTE**

\$124,955

9 months

This project provided logistic and vendor support for the invite-only 2019 Master Plan for Aging Forum in Sacramento.

## **California Advocacy Network**

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

**HOMEBRIDGE**

\$98,395

11 months

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

**INDEPENDENT LIVING CENTER OF KERN COUNTY**

\$29,000

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

**ALAMEDA COUNTY MEALS ON WHEELS**

\$25,000

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

**ALZHEIMER'S ORANGE COUNTY**

\$25,000

### **Community Living Implementation Council: Aging and Disability Resource Connection**

**FREED/ADRC OF NEVADA COUNTY**

\$25,000

**Los Angeles Aging Advocacy Coalition**  
**ST. BARNABAS SENIOR CENTER OF LOS ANGELES**  
\$22,500

**Central Valley Long-Term Services and Supports Coalition**  
**AGEWELL FRESNO**  
\$10,000

**Ventura County Hospital to Home Alliance**  
**CAMARILLO HEALTH CARE DISTRICT**  
\$10,000

**Contra Costa County Advisory Commission on Aging**  
**CHOICE IN AGING**  
\$10,000

**Diversability Advocacy Network**  
**DISABILITY ACTION CENTER**  
\$10,000

**San Francisco Long-Term Care Coordinating Council**  
**HOMEBRIDGE**  
\$10,000

**San Diego Senior Alliance**  
**ST. PAUL'S SENIOR SERVICES**  
\$10,000

**Increasing Access to Community-Based Services Through Collaboration, Education, and Advocacy**  
**YOLO HEALTHLY AGING ALLIANCE**  
\$10,000

**Aging Services Collaborative of Santa Clara County**  
**SILICON VALLEY INDEPENDENT LIVING CENTER**  
\$7,500

**Aging and Disability Resource Connection Placer County**  
**AREA 4 AGENCY ON AGING**  
\$5,000

**Santa Barbara County Adult and Aging Network**  
**CENTRAL COAST CENTER FOR INDEPENDENT LIVING**  
\$5,000

**Inland Empire Long-Term Services and Supports Coalition**  
**COMMUNITY ACCESS CENTER**  
\$5,000

**Senior Coalition of Stanislaus County**  
**HEALTHY AGING ASSOCIATION**  
\$5,000

**Central Coast Long-Term Services and Supports Coalition**  
**INDEPENDENT LIVING RESOURCE CENTER, INC.**  
\$5,000

**New Beginning Coalition**  
**SAN MATEO COUNTY AGING AND ADULT SERVICES**  
\$5,000

**Bay Area Senior Health Policy Coalition**  
**ON LOK, INC.**  
\$4,966

9 months

The California Advocacy Network is a statewide movement comprised of the Sacramento-based California Collaborative for Long-Term Services and Supports and Regional Coalitions. In 2019, the network engaged with the Newsom administration and legislative leaders to maintain the urgency for the development and advancement of the Master Plan for Aging.

**Improving Care for Populations with Complex Needs in ACOs**  
**INSTITUTE FOR ACCOUNTABLE CARE**  
\$199,990  
36 months

This project, co-funded by The Commonwealth Fund, The John A. Hartford Foundation, and the Robert Wood Johnson Foundation, provided support to accountable care organizations (ACOs) implementing home-based care models for populations with complex needs.

## **Improving Older Adults' Care by Advancing CBO-Health Care Partnerships**

### **NATIONAL ASSOCIATION OF AREA AGENCIES ON AGING**

\$150,000

36 months

This project, co-funded with The John A. Hartford Foundation, supported the efforts of the Aging and Disability Business Institute to provide technical assistance to community-based organizations (CBOs) building their business acumen to partner with health care.

## **Medicare Advantage Learning Community**

### **INSTITUTE FOR HEALTHCARE IMPROVEMENT**

\$120,636

22 months

This project, co-funded by The Commonwealth Fund, The John A. Hartford Foundation, Peterson Center on Healthcare, and the Robert Wood Johnson Foundation, engaged Medicare Advantage plans to implement a model of care for populations with complex needs.

## **Research on Medicare Advantage Evidence-Based Interventions**

### **AVALERE HEALTH LLC**

\$75,000

6 months

This project, co-funded by The Commonwealth Fund and The John A. Hartford Foundation, evaluated the use of evidence-based care models for Medicare Advantage populations with complex care needs.

## **Coordinated Care Initiative Health Plan Learning Collaborative**

### **CALIFORNIA ASSOCIATION OF HEALTH PLANS**

\$75,000

24 months

This project convened bimonthly meetings of the California health plans participating in the Coordinated Care Initiative to learn about best practices from one another and other states.



## **Better Care Playbook – Phase IV**

### **INSTITUTE FOR HEALTHCARE IMPROVEMENT**

\$75,000

12 months

This project, co-funded by The Commonwealth Fund, The John A. Hartford Foundation, Peterson Center on Healthcare, and the Robert Wood Johnson Foundation, supported the curation and dissemination of complex care resources and best practices through the [Better Care Playbook](#).

## **New State Opportunities to Advance Integrated Care and Long-Term Services and Supports**

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

\$74,971

9 months

This project conducted an analysis of state progress toward advancing integrated care models and long-term services and supports rebalancing to home- and community-based services.

## **LTSS Quality Reporting Learning Collaborative**

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

\$74,900

12 months

The project established a learning collaborative with Managed Long-Term Services and Supports health plans and community-based organizations to increase attention and promote reporting on four new HEDIS® long-term services and supports (LTSS) quality measures.

## **Increasing Access to Person-Centered Care**

### **VICTOR TABBUSH CONSULTING**

\$46,834

6 months

This project interviewed provider groups in California to define the ratio of risk-bearing contracts that leads to providing person-centered care to the entire patient populations.

## **Advancing Models for Complex Care Populations in Late Life**

**CLINICAL EXCELLENCE RESEARCH CENTER AT STANFORD UNIVERSITY**

\$35,000

5 months

This project convened national leaders in health care to understand the opportunities and barriers to implementing models of care for Medicare Advantage populations with complex needs in late life.

## **Engaging Philanthropy in Complex Care**

**GRANTMAKERS IN AGING**

\$20,000

24 months

This project, co-funded by The Commonwealth Fund, The John A. Hartford Foundation, Peterson Center on Healthcare, and the Robert Wood Johnson Foundation, engaged health and aging philanthropy to expand models of care for complex populations.

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

**NATIONAL ACADEMY OF SCIENCES**

\$20,000

12 months

This project co-funded the Forum of Aging, Disability, and Independence that explores innovative policy and practical solutions to assist older adults and people with disabilities.

## **Enhancing Community Health Needs Assessments**

**NATIONAL ACADEMY OF SCIENCES**

\$5,000

7 months

This project provided support for the National Academy of Sciences special publication on principles and practices for community health needs assessments.



## GRANTS LIST:

# Thematic Goal 2

### **A Repeatable Co-Design System: Design the Aging You Love**

**BIRSEL + SECK**

\$801,075

12 months

This project conducted research to uncover insights about the wishes and worries of middle-income, older Americans, mapped out the opportunity spaces, and developed an engagement strategy to garner interest from high-level talent within the creative business community (e.g., entrepreneurs, designers, business, academic institutions).

### **Pilot Workshops to Learn from Entrepreneurs**

**MATTER**

\$145,000

6 months

This project conducted four research convenings with entrepreneurs to develop insights on how to convene, inspire, and motivate entrepreneurs to design for older adults.

### **Market Assessment for Resilience Lab Impact Investments**

**VILLAGE CAPITAL**

\$125,461

6 months

This project funded a market assessment of the current U.S. venture ecosystem of for-profit startup companies whose customers, end users, or beneficiaries are older adults.



## GRANTS LIST:

# Thematic Goal 3

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

**HENRY J. KAISER FAMILY FOUNDATION**

\$500,000

24 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.

### **Honoring Aging and Caregiving at the 131<sup>st</sup> Tournament of Roses® Parade and Showcase of Floats**

**PHOENIX DECORATING COMPANY**

\$275,000

**MCCABE MESSAGE PARTNERS**

\$42,500

**TOURNAMENT OF ROSES**

\$9,880

6 months

This project celebrated family caregivers and engaged media through a float at the 2020 Rose Parade® titled *Hope's Heroes: Honoring Caregivers of All Generations*.

## **Changing the Narrative: Aging and the Future of Care**

### **HOLLYWOOD, HEALTH & SOCIETY**

\$250,000

24 months

This project promoted person-centered care and caregiving storylines in entertainment and worked to improve the diversity of portrayals of older adults and aging to touch a variety of television and film audiences.

## **Millennial Caregiving Media Partnership**

### **VOX MEDIA, INC**

\$200,000

6 months

This project partnered with a dynamic media partner known for significant millennial viewership in order to develop and disseminate an explainer video on the role of millennial caregivers in society and shed light on their correlated policy and service needs.

## **Reframing Aging Initiative**

### **THE GERONTOLOGICAL SOCIETY OF AMERICA**

\$75,000

36 months

This project supported the long-term, social change endeavor to improve the public's understanding of aging and ultimately change the narrative around aging in ways that encourage improved policies and programs. This project was funded by eight additional organizations.

## **Guiding Principles for Supplemental Benefit Flexibility**

### **ATI ADVISORY**

\$67,700

4 months

### **LONG-TERM QUALITY ALLIANCE**

\$21,289

8 months

These projects convened an expert working group and developed a guiding principles report to foster implementation of the Special Supplemental Benefits for the Chronically Ill (SSBCI) within Medicare Advantage plans.

## **Advancing and Disseminating SSBCI Principles**

### **ATI ADVISORY**

\$74,944

7 months

### **LONG-TERM QUALITY ALLIANCE**

\$69,691

5 months

These projects disseminated the guiding principles for Special Supplemental Benefits for the Chronically Ill (SSBCI) to policymakers and other audiences, and identified next steps to improve access for eligible Medicare Advantage plan members.

## **Medicare 101 for State Health Policy Leaders**

### **NATIONAL ACADEMY OF STATE HEALTH POLICY**

\$35,000

6 months

This project organized a session at the Annual State Policy Conference to explore how state health policy staff can align, integrate, and leverage Medicare for their dual eligible residents.

## **The Forgotten Middle: Results and National Briefing**

### **NATIONAL INVESTMENT CENTER FOR SENIOR HOUSING & CARE, INC.**

\$15,000

3 months

This project supported a briefing in Washington, D.C., to release a *Health Affairs* article on middle-income older adults' capacity to afford housing and services. This project was co-funded by the AARP Foundation and The John A. Hartford Foundation.

# STATEMENTS OF FINANCIAL POSITION

## AS OF DECEMBER 31, 2019 AND 2018

	2019	2018
<b>ASSETS</b>		
<b>CURRENT ASSETS:</b>		
Cash and cash equivalents	\$4,355,020	\$3,906,442
Investments	225,393,838	201,344,241
Interest and dividend receivables	314,226	333,864
Prepaid expenses and other current assets	8,755	10,673
Total current assets	230,071,838	205,595,220
PROPERTY AND EQUIPMENT—Net	127,993	133,107
INVESTMENTS	943,277	729,665
MISSION-IMPACT INVESTMENTS	999,998	999,998
DEPOSITS AND OTHER ASSETS	18,072	18,072
<b>TOTAL ASSETS</b>	<b>\$232,161,179</b>	<b>\$207,476,062</b>
<b>LIABILITIES AND NET ASSETS</b>		
<b>CURRENT LIABILITIES:</b>		
Accounts payable and accrued expenses	\$465,501	\$222,589
Accrued payroll and related benefits	691,631	627,854
Grants payable	1,012,685	1,266,434
Due to parent and affiliates	8,122	12,600
Total current liabilities	2,177,939	2,129,477
DEFERRED COMPENSATION	943,277	729,665
DEFERRED RENT	245,347	253,526
GRANTS PAYABLE	593,018	726,255
Total liabilities	3,959,581	3,838,923
<b>NET ASSETS</b>		
Without restrictions	\$228,071,938	203,637,139
With restrictions	129,660	-
Total net assets	\$228,201,598	\$203,637,139
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>\$232,161,179</b>	<b>\$207,476,062</b>

## STATEMENTS OF ACTIVITIES

### FOR THE YEARS ENDED DECEMBER 31, 2019 AND 2018

	2019 Total	2018 Total
<b>Without Restrictions</b>		
NET REVENUES—Investment income	\$15,658,830	\$18,536,922
NET ASSETS RELEASED FROM RESTRICTIONS	260,340	-
Total revenue	15,919,170	18,536,922
OPERATING EXPENSES:		
Grants and other program expense	9,249,890	8,467,309
General and administrative expense	1,568,760	1,441,673
Total operating expenses	10,818,650	9,908,982
NET OF REVENUE OVER OPERATING EXPENSES	5,100,520	8,627,940
CHANGE IN UNREALIZED GAIN (LOSS) ON INVESTMENTS—Net	19,334,279	(25,734,361)
INCREASE IN NET ASSETS	24,434,799	(17,106,421)
<b>With Restrictions</b>		
REVENUES		
Restricted Contributions	390,000	-
Net Assets released from restrictions used for operations	(260,340)	-
Total change in net assets with restrictions	129,660	-
NET ASSETS—Beginning of year	203,637,139	220,743,560
<b>NET ASSETS—End of year</b>	<b>\$228,201,598</b>	<b>\$203,637,139</b>



# 2019 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 and  
Chief Executive Officer



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



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



**John Zapolski**  
Vice President  
Innovations

# 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




The SCAN Foundation


3800 Kilroy Airport Way, Suite 400


Long Beach, CA 90806


Phone: 888.569.7226

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# 2019 Annual Report

