



2016



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.

A handwritten signature in black ink, appearing to read 'Bruce Chernof'.

Bruce Chernof, MD
President & CEO

Executive Team

BRUCE A. CHERNOF, MD

President & Chief Executive Officer

GRETCHEN E. ALKEMA, PHD, LCSW

Vice President, Policy & Communications

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Vice President, Programs & Operations

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KALI PETERSON, MS, MPA

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Director of Grants Administration

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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

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ABBREVIATIONS AND ACKNOWLEDGEMENTS

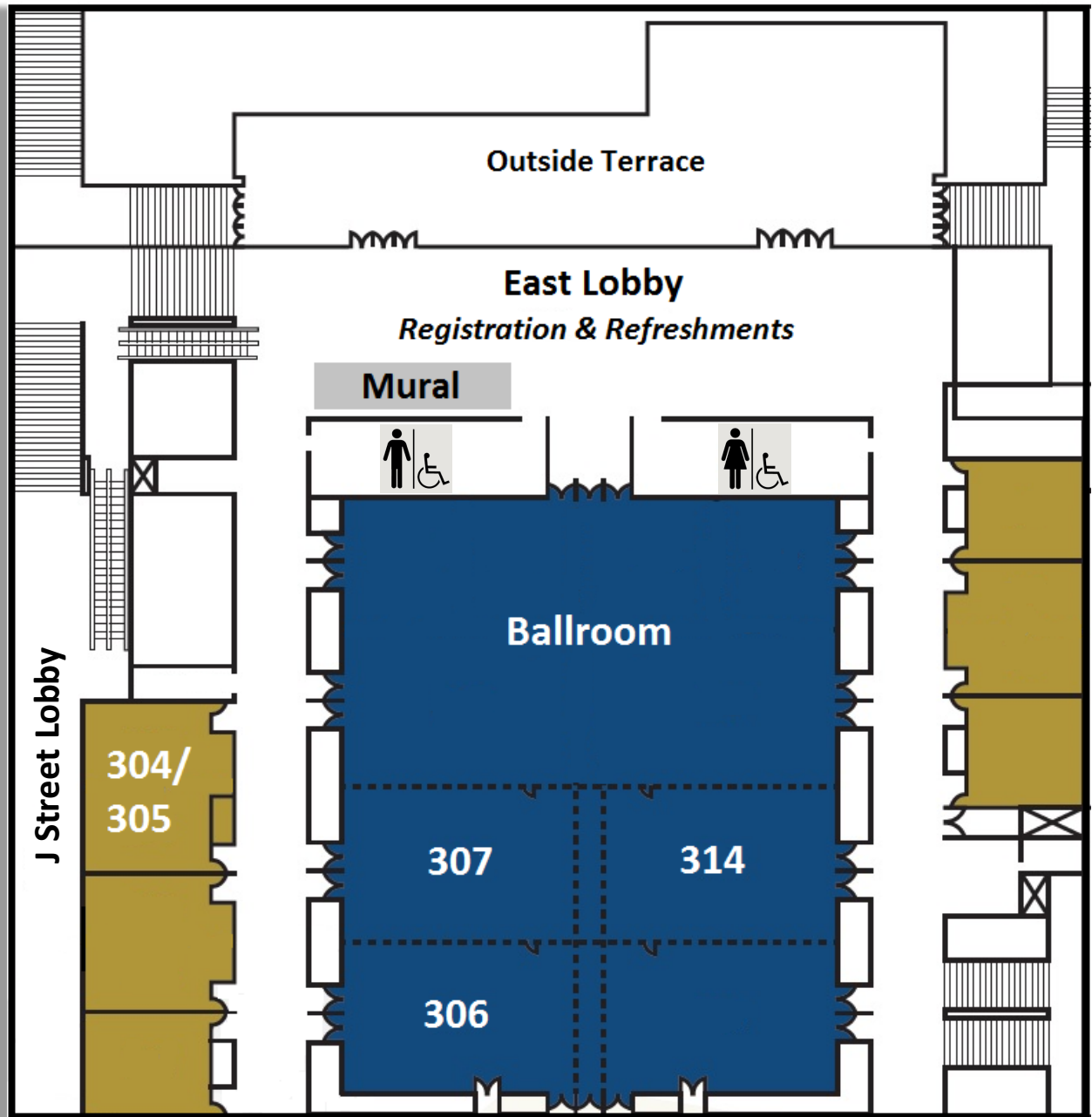
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SACRAMENTO CONVENTION CENTER FACILITY MAP

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.
East Lobby

SUMMIT REGISTRATION OPENS

Refreshments are available in the East Lobby.

9:00 a.m.
Ballroom

WELCOME AND OPENING REMARKS

Bruce Chernof, MD

President & CEO

The SCAN Foundation

9:15 a.m.
Ballroom

MORNING KEYNOTE

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.
Ballroom

MORNING PANEL

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.
Ballroom

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

Carrie Graham, PhD, MGS

Assistant Director of Research
Health Research for Action
University of California, Berkeley

Stephanie Gibbs, JD (Moderator)

Senior Program Officer
Center for Health Care Strategies

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

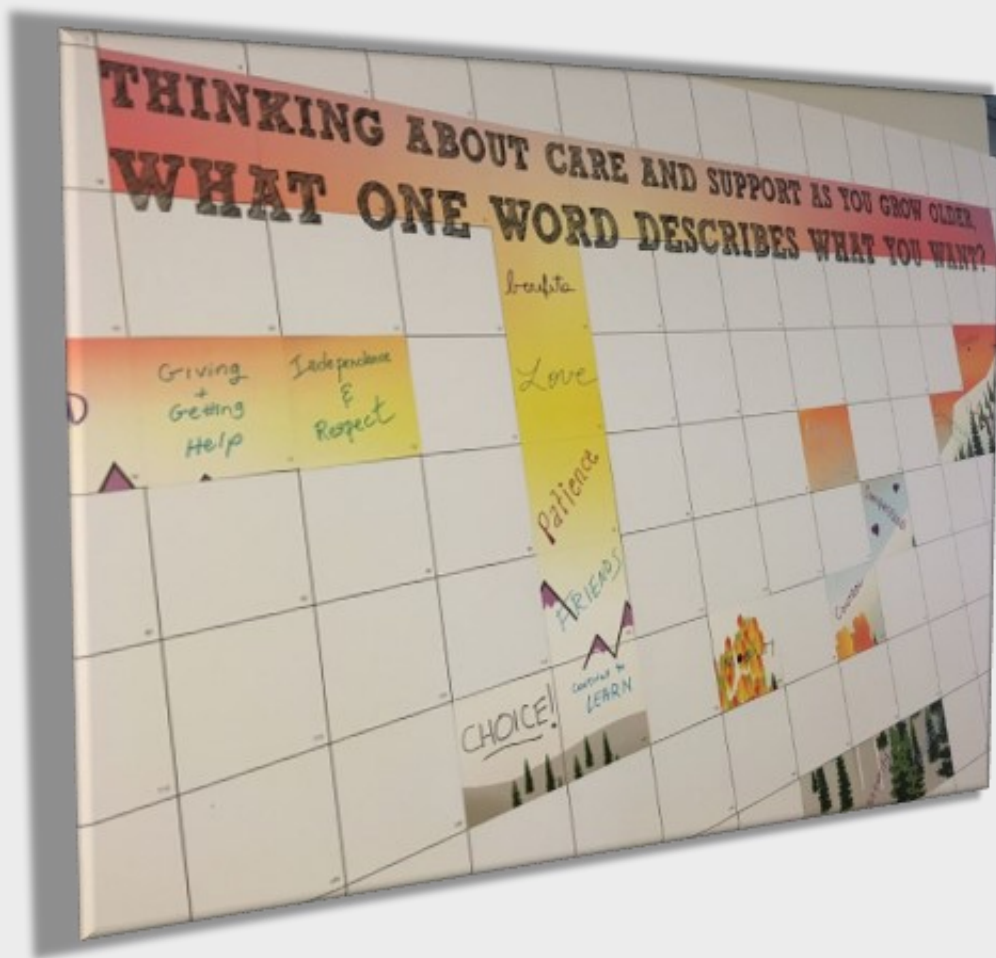
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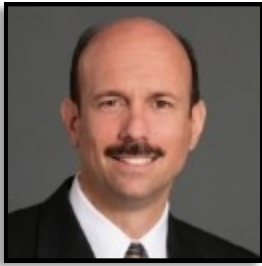
Thinking about care and support as you grow older, what one word describes what you want?



WELCOME & OPENING REMARKS

9:00 a.m. Ballroom

Welcome & Opening Remarks



Bruce A. Chernof, MD

President & Chief Executive Officer

The SCAN Foundation

BChernof@TheSCANFoundation.org

[@DrBruce_TSF](https://twitter.com/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:

9:15 a.m. Ballroom

Bringing Person-Centered Care to Life

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.

9:45 a.m. Ballroom

LTSS in California: The State of the State

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

Vice President, State Programs
California Association of Health Plans
ACHapman@CalHealthPlans.org
[@calhealthplans](https://twitter.com/calhealthplans)

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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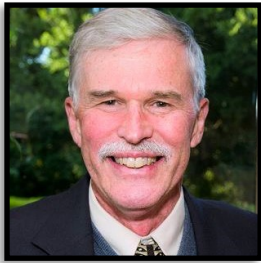


### **Jennifer Kent**

Director  
California Department of Health Care Services (DHCS)  
[Jennifer.Kent@DHCS.ca.gov](mailto:Jennifer.Kent@DHCS.ca.gov)  
[@DHCSDirector](https://twitter.com/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.

## MORNING PANEL



**Marty Lynch, PhD, MPA**

Executive Director and Chief Medical Officer

LifeLong Medical Care

[MLynch@LifeLongMedical.org](mailto:MLynch@LifeLongMedical.org)

[@LMCLynch](#)

Marty Lynch, PhD, MPA, is the CEO of LifeLong Medical Care, a 16-site community health center in the San Francisco Bay Area. In addition to serving the uninsured and Medi-Cal populations, LifeLong focuses on providing integrated services to special populations such as disabled older adults, frequent users of emergency rooms, and homeless with medical, mental health, and/or substance abuse problems. Mr. Lynch has served as Director of LifeLong and the Over 60 Health Center since 1982. He is also involved in public policy and research activities related to health access for the uninsured, long-term care models, chronic care, and financing care for disabled populations.

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Jane Ogle

Consultant

JaneOgle@Kogle.com

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.

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11:00 a.m. Room 306

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

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 A. Clanon, MD

Medical Director

Health Care Services Agency of Alameda County

Kathleen.Clanon@ACGov.org

[@AlamedaCounty](#)

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.

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**James Cotter, MD, MPH**

Regional Medical Director, Health Services Department

Partnership HealthPlan of California

[JCotter@PartnershipHP.org](mailto:JCotter@PartnershipHP.org)

[@PartnershipHP](#)

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.

## MORNING CONCURRENT SESSION



### **Sharon Rapport**

Associate Director, California Policy  
Corporation for Supportive Housing

[Sharon.Rapport@CSH.org](mailto: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).

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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.

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11:00 a.m. Room 314

Moving the Needle on Long-Term Care Financing

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](https://twitter.com/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**

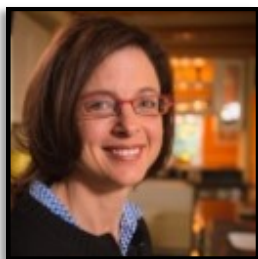
Principal Consultant

California State Senate Insurance Committee

[Hugh.Slayden@sen.ca.gov](mailto: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.

## MORNING CONCURRENT SESSION



**Anne Tumlinson**

Founder

Daughterhood.org

[Anne@Daughterhood.org](mailto:Anne@Daughterhood.org)

[@daughterhood](https://twitter.com/daughterhood)

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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Jeannee Parker Martin

President & Chief Executive Officer

LeadingAge California

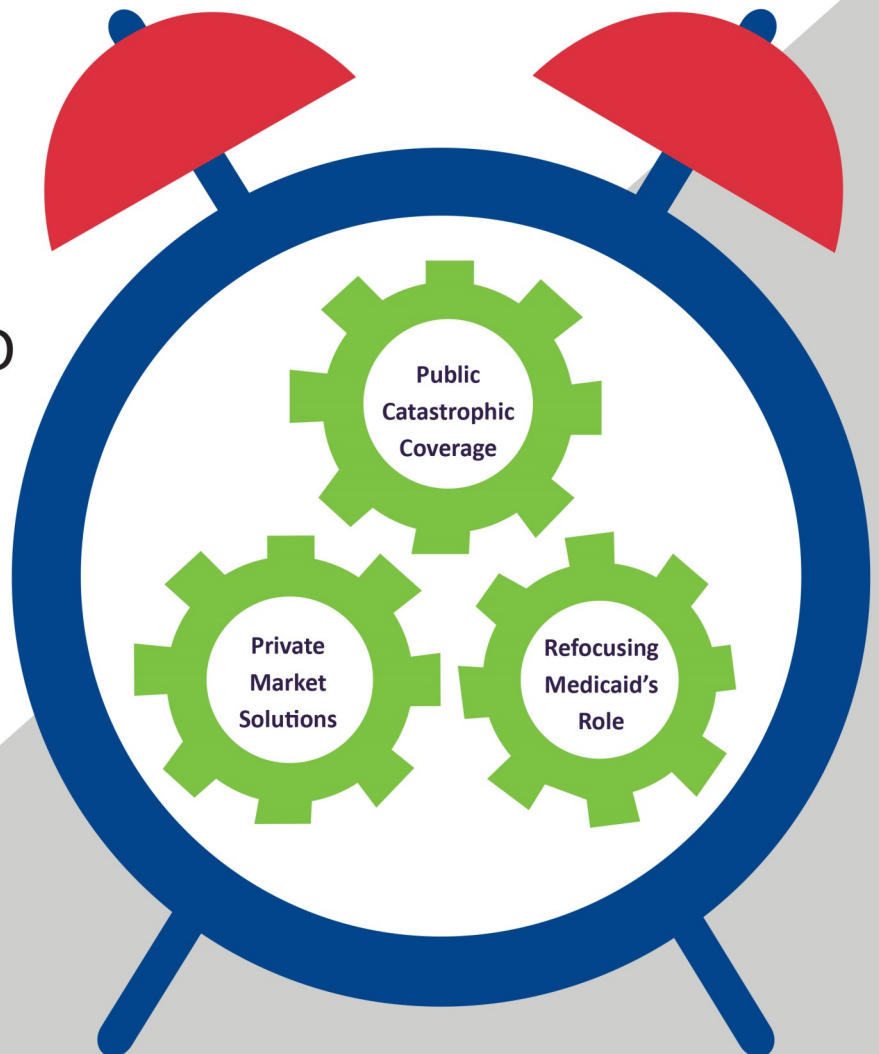
jpmartin@aging.org

[@LeadingAgeCA](https://twitter.com/LeadingAgeCA)

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



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11:00 a.m. Room 307

Fostering Care Coordinators in Your Integrated Model

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](mailto:HMcNeal@CSUSM.ed)

[@Helencsupalcare](https://www.instagram.com/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.

## MORNING CONCURRENT SESSION



**Lori Peterson, MA**

Chief Executive Officer

Collaborative Consulting

[Lori@CollaborativeConsulting.net](mailto:Lori@CollaborativeConsulting.net)

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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11:00 a.m. Room 304/305

8 Steps for Using Social Media to Maximize Engagement

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!

#LTSSummit



NOTES



Zack Langway

Vice President, Global Development

Fenton Communications

ZLangway@Fenton.com

[@ZackFromNJ](#)

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.

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### **Mari Nicholson, MHS**

Director of Communications

The SCAN Foundation

[MNicholson@TheSCANFoundation.org](mailto:MNicholson@TheSCANFoundation.org)

[@TheSCANFndtn](#)

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.

## NOTES:

[illegible]

# MEET THE SPEAKERS LUNCH

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

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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)*

### **Mark DiCamillo**

Senior Vice President

Field Research Corporation

*(Biography on Page 45)*

### **Jessica Briefer French**

Senior Research Scientist

National Committee for Quality Assurance

*(Biography on Page 39)*

### **Sandra F. Fitzpatrick, MA**

Executive Director

California Commission on Aging

*(Biography on Page 52)*

### **Dawn Butler, MSW, JD**

Director

GRACE Training and Resource Center  
Indiana University School of Medicine

*(Biography on Page 55)*

### **Stephanie Gibbs, JD**

Senior Program Officer

Center for Health Care Strategies

*(Biography on Page 46)*

### **Athena Chapman**

Director, State Programs

California Association of Health Plans

*(Biography on Page 13)*

### **Carrie Graham, PhD, MGS**

Assistant Director of Research

Health Research for Action

University of California, Berkeley

*(Biography on Page 46)*

**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**

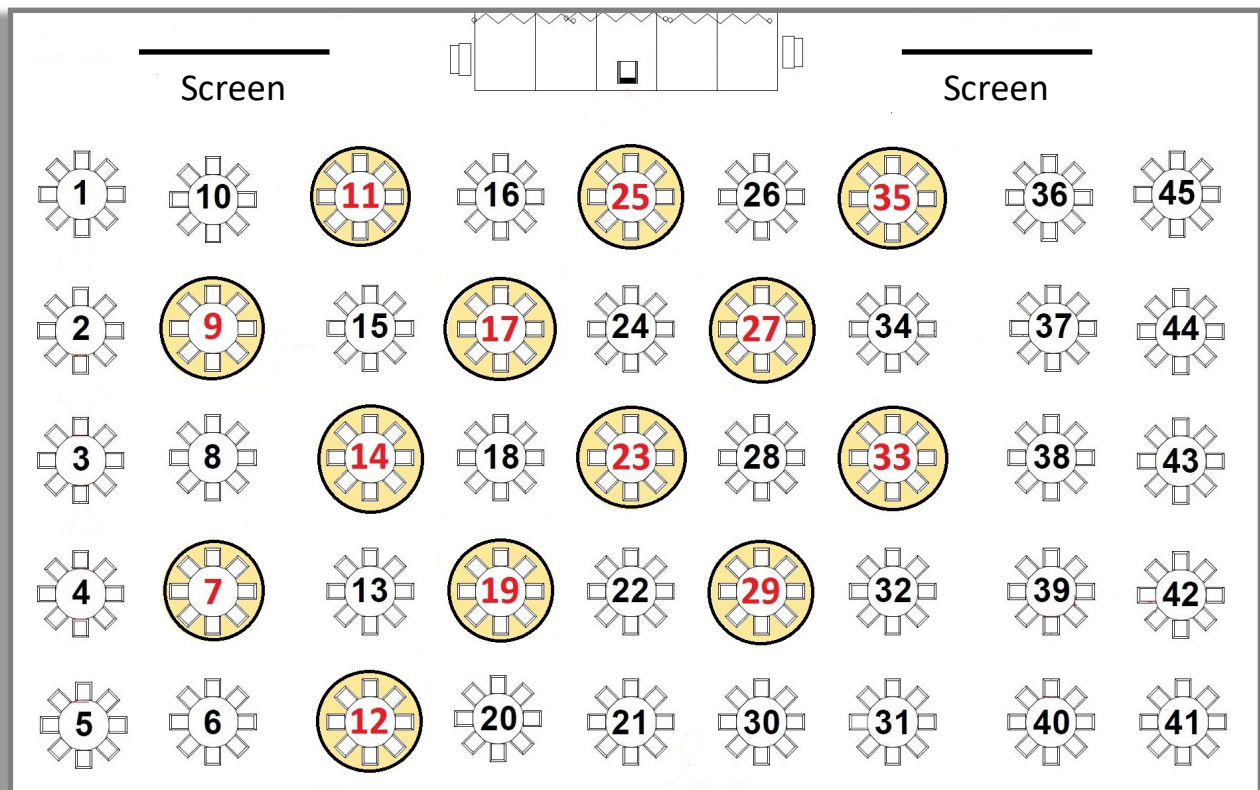
Mary Pickford Foundation Professor of  
Gerontology  
Professor of Health Services  
University of Southern California, Davis  
School of Gerontology  
*(Biography on Page 18)*

***A diagram of the discussion  
tables is available on  
page 36.***

# MEET THE SPEAKERS LUNCH

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:

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1:30 p.m. Room 314

### New Quality Measure Approaches for Person-Centered Care

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*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



**Jessica Briefer French**

Senior Research Scientist

National Committee for Quality Assurance

[French@NCQA.org](mailto:French@NCQA.org)

[@NCQA](https://twitter.com/NCQA)

Jessica Briefer French is a Senior Research Scientist at the National Committee for Quality Assurance (NCQA) with over two decades experience in health care quality. Recent work has focused on measurement and evaluation of quality of care for vulnerable populations, adults with complex health care, and long-term services and supports (LTSS) needs, including people dually eligible for Medicare and Medicaid. She is currently Co-Principal Investigator for a two-part project to develop and pilot accreditation standards for organizations that provide LTSS, and to develop and pilot outcome measures of person-driven goal attainment.

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Tracy Lustig, DPM, MPH

Senior Director

National Quality Forum

NSilverman@QualityForum.org

[@NatQualityForum](https://twitter.com/NatQualityForum)

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.

AFTERNOON CONCURRENT SESSION



Anwar Zoueihid

Vice President, Health Services

Partners in Care Foundation

AZoueihid@PICF.org

[@AZoueihid](https://twitter.com/AZoueihid)

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

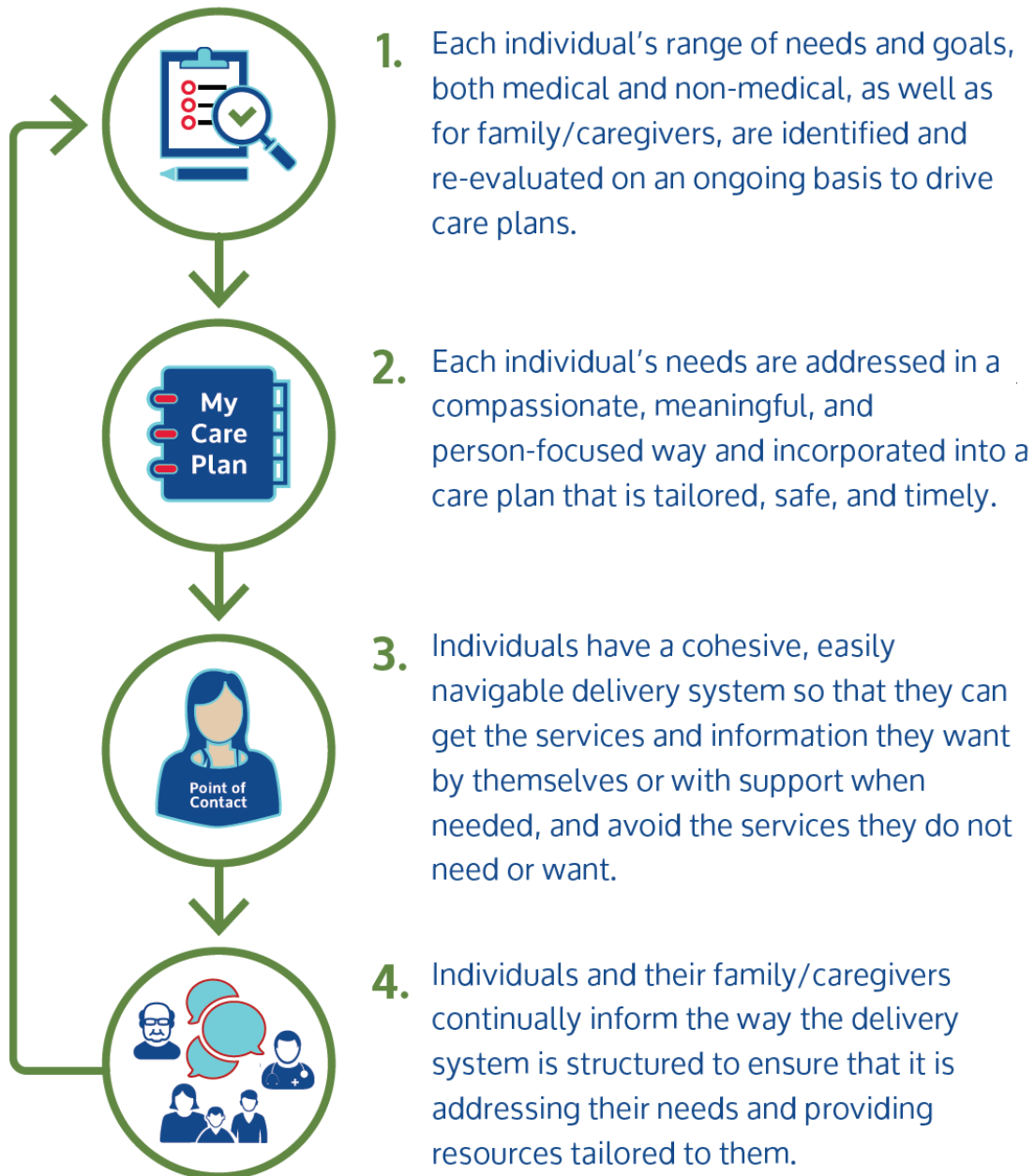
The SCAN Foundation

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[@TheSCANFndtn](https://twitter.com/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



## NOTES

## NOTES:

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1:30 p.m. Room 307

### Evaluating CCI: What's Next for the Program?

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*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**

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

[Sarah.Brooks@DHCS.ca.gov](mailto:Sarah.Brooks@DHCS.ca.gov)  
[@DHCS\\_CA](#)

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

Senior Vice President
Field Research Corporation

MarkD@Field.com

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.

AFTERNOON CONCURRENT SESSION



Carrie Graham, PhD, MGS

Assistant Director of Research
Health Research for Action
University of California, Berkeley
CLGraham@Berkeley.edu
[@UCHealthAction](#)

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**

Senior Program Officer  
Center for Health Care Strategies  
[SGibbs@CHCS.org](mailto:SGibbs@CHCS.org)  
[@CHCShealth](#)

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.

## NOTES:

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1:30 p.m. Room 306

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

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*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:

[illegible]

## AFTERNOON CONCURRENT SESSION



### **Amber Didier**

Senior Fiscal and Policy Analyst

Legislative Analyst's Office

[Amber.Didier@LAO.ca.gov](mailto:Amber.Didier@LAO.ca.gov)

[@LAO\\_CA](#)

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.

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Callie Freitag

Fiscal and Policy Analyst

Legislative Analyst's Office

Callie.Freitag@LAO.ca.gov

[@LAO_CA](#)

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

Assistant Program Budget Manager

California Department of Finance

Adam.Dorsey@DOF.ca.gov

[@HDataFinance](#)

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**

Executive Director

Central Coast Center for Independent Living

[EQuezada@CCIL.org](mailto:EQuezada@CCIL.org)

[@cccil\\_org](#)

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.

## AFTERNOON CONCURRENT SESSION



**Edie Yau**

Director, Diversity and Inclusion

Alzheimer's Association, Northern California & Northern Nevada Chapter

[EYau@ALZ.org](mailto:EYau@ALZ.org)

[@AlzNorCalNorNev](#)

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.

NOTES:

[illegible]

AFTERNOON CONCURRENT SESSION

1:30 p.m. Room 304/305

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

Director

GRACE Training and Resource Center
Indiana University School of Medicine

ButlerDE@IU.edu

[@graceteamcare](https://www.instagram.com/graceteamcare)

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.

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**Eric Thai, CPA, MBA**

Director of Finance

The SCAN Foundation

[EThai@TheSCANFoundation.org](mailto:EThai@TheSCANFoundation.org)

[@TheSCANFndtn](https://www.instagram.com/TheSCANFndtn)

Eric Thai, CPA, MPA, 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.



## AFTERNOON CONCURRENT SESSION



**Erin Westphal, MS**

Program Officer

The SCAN Foundation

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[@TheSCANFndtn](#)

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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NOTES:

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3:15 p.m. Ballroom

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

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](https://twitter.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.

NOTES:

[illegible]

COMMONLY USED ABBREVIATIONS

Long-Term Services & Supports Commonly Used Abbreviations

~ 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

COMMONLY USED ABBREVIATIONS

CDA

California Department of Aging

CDC

Centers for Disease Control and Prevention

CHHS

California Health and Human Services Agency

CM

Care Management or Care Manager

CMC

Cal MediConnect

CMMI

Center for Medicare and Medicaid Innovation

CMS

Centers for Medicare and Medicaid Services

COHS

County-Organized Health System

CPOs

Care Plan Options

CTI

Care Transitions Intervention

~ D ~

DDS

California Department of Developmental Services

DHCS

California Department of Health Care Services

DME

Durable Medical Equipment

D-SNP

Dual Eligible Special Needs Plan

DSS

California Department of Social Services

~ E ~

ER

Emergency Room

ED

Emergency Department

~ F ~

FDA

Food and Drug Administration

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

~ I ~

ICF

Intermediate Care Facility

ICP

Individual Care Plan

ICT

Interdisciplinary Care Team

IHS

Indian Health Service

COMMONLY USED ABBREVIATIONS

IHSS

In-Home Supportive Services

ILC

Independent Living Center

IOPCM

Intensive Out-Patient Care Management

~ K ~

KI

Key Informant

~ L ~

LTC

Long-Term Care

LTSS

Long-Term Services and Supports

~ M ~

MBHO

Managed Behavioral Health Organization

MCO

Managed Care Organization

MFP

Money Follows the Person (called
Community Transitions in California)

MLR

Medical Loss Ratio

MLTSS

Managed Long-Term Services and
Supports

MMC

Medicaid Managed Care

MMCO

Medicare-Medicaid Coordination
Office

MSSP

Multi-Purpose Senior Services
Program

~ N ~

NCM

Nurse Care Manager

NCQA

National Committee for Quality Assurance

NORC

Naturally Occurring Retirement
Community

NQF

National Quality Forum

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:

ACKNOWLEDGEMENTS

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

ACCESSIBILITY

Brenda Premo

CATERING

Classique Catering

FACILITY

Sacramento Convention Center

AUDIO/VISUAL

Sight & Sound Audio Visual, Inc.

LOGISTICS

Government Action & Communication Institute (GACI)



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The SCAN Foundation

NOTES

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NOTES

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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.



www.TheSCANFoundation.org