



Transforming Care for Older Adults

2014

ANNUAL REPORT





ANNUAL REPORT 2014

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Introduction: A New Approach to Advancing Aging with Dignity, Choice, and Independence

In 2014, The SCAN Foundation celebrated its sixth year of working to improve the lives of older adults and their families. This field is constantly in motion, where much work is needed to support older adults with chronic health conditions and functional limitations, as well as family members and loved ones who care for them. The Foundation began exploring areas where it could continually be bold, catalytic, and impact-oriented in transforming the system of care that all older Americans will eventually touch. Therefore, we developed and began implementing an updated strategic framework, incorporating our new vision, mission, and goals.

Please click on the image for a short video on our progress throughout 2014 to transform care for older adults.



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

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

Our Three Thematic Goals:

1. Medicare-Medicaid Integration: Integrate care and financing for vulnerable, low-income older adults;
2. 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; and
3. Long-Term Care Financing: Provide working families with tools to help pay for their future care needs.

Grants List for Thematic Goal 1: Medicare-Medicaid Integration

Matching Data Systems for CDSMP Evaluation in Seniors Housing

MERCY HOUSING OF CALIFORNIA

\$7,937

8 months

This project implemented the Chronic Disease Self-Management Program (CDSMP) with Mercy Housing residents. The project illustrated how matching data between the CDSMP and the housing provider can help improve health and quality of life outcomes for residents in subsidized housing.

LTQA Strategic Planning

LONG TERM QUALITY ALLIANCE

\$8,000

3 months

This project supported a comprehensive strategic planning process for the Long Term Quality Alliance to develop their goals and objectives for a three-year period.

Building the Business Case: Responding to the Changing Environment for the Aging Network

RESEARCH FOUNDATION OF THE CITY UNIVERSITIES OF NEW YORK

\$8,500

9 months

This project developed a half-day session at the 2014 American Society on Aging annual conference on building the business case for the aging network in the changing environment. Proceedings were summarized in a brief that was distributed nationally.

Pathways 2014 On the Road to Innovation Bus Tour

WOMEN'S FOUNDATION OF CALIFORNIA

\$10,500

3 months

This project hosted the Pathways Tour to educate members and staff of the California Senate Select Committee on Aging and Long-Term Care on innovative local programs from across California aimed at helping older adults live with independence in their communities.

Best Practices in Health Plan Approaches to Training Care Coordinators in Duals and Managed Long-Term Services and Supports Programs

CENTER FOR HEALTH CARE STRATEGIES

\$30,857

4 months

This project helped inform California's Medi-Cal and Cal MediConnect managed care organizations on processes for developing and implementing enhanced care coordinator training.

Hispanic Outreach and Education Cal MediConnect in Los Angeles County

NATIONAL HISPANIC COUNCIL ON AGING

\$35,000

9 months

This project conducted targeted outreach around the Cal MediConnect program to educate and inform dually-eligible Latinos in Los Angeles County about the demonstration and the care delivery options they may have.

Long-Term Care Education Initiative Planning Grant

NATIONAL ASSOCIATION OF LATINO ELECTED OFFICIALS - NALEO EDUCATION FUND

\$50,670

4 months

This project increased visibility of aging and long-term care issues throughout its membership by hosting a webinar and panel discussions at its annual health care policy institute.

Cal MediConnect Learning Forums

CENTER FOR HEALTH CARE STRATEGIES

\$56,105

5 months

This project brought key health plan staff and community providers together for three critical forums focused on care coordination questions for California.

Creating a Path Forward on Uniform Needs Assessment

LONG TERM QUALITY ALLIANCE

\$74,800

2 months

This project hosted a policy roundtable meeting in Washington, D.C. on the development of uniform assessment for use across states and in federal programs. LTQA developed two background papers on the current status of and the need for uniform assessment and produced a post-meeting white paper summarizing the proceedings with an action plan to implement recommendations.

Planning for an Evaluation of California's Alignment Demonstration for Dual Eligible Beneficiaries

THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, SAN FRANCISCO

\$75,000

7 months

Through a planning grant, this project designed a state-specific evaluation of California's alignment demonstration for dual eligible beneficiaries: Cal MediConnect. The research team engaged stakeholders to provide input to survey questions, identified evaluation priorities, and developed and pilot-tested data collection instruments.

2014 Long-Term Services and Supports Summit

GOVERNMENT ACTION COMMUNICATION INSTITUTE

\$74,631

7 months

This project provided logistical support for the 2014 California Summit on Long-Term Services and Supports, held on September 30, 2014.

DHCS Academy

CALIFORNIA DEPARTMENT OF HEALTH CARE SERVICES

\$75,000

3 months

This project supported two cohorts of the Department of Health Care Services Academy, a nine-month training course to improve capacity of the department's management teams to meet the increasingly complex task of administering California's Medicaid program (Medi-Cal).

Duals Demonstration Ombudsman Program Convening

FAMILIES USA FOUNDATION

\$75,000

10 months

This project tested the value of bringing state and local entities that are implementing Medicare-Medicaid Demonstration Ombudsman Programs across the country together in a learning collaborative with federal leaders supporting the pilots.

Ethnic Media Reporting Fellowship & Training to Cover Dual Eligible Integration Demonstration Program

PACIFIC NEWS SERVICE d/b/a NEW AMERICA MEDIA

\$80,560

13 months

This project established a long-term care journalism fellowship program to provide coverage of Cal MediConnect in ethnic communities, for distribution through ethnic media.

Preparing for California's Dual Eligibles' Transition to Managed Care: An Outreach and Education Project - Phase II

JUSTICE IN AGING (FORMERLY NATIONAL SENIOR CITIZENS LAW CENTER)

\$176,368

12 months

This project provided education and technical assistance to advocates and service providers in eight counties to support implementation of the Coordinated Care Initiative.

Development of a Universal Assessment Tool for California's Home and Community-Based Services Programs

THE REGENTS OF THE UNIVERSITY OF CALIFORNIA, LOS ANGELES

\$349,313

12 months

This project provided technical expertise to the state's Universal Assessment Stakeholder Workgroup and developed a draft universal assessment tool and process for assessing individuals' needs for Medi-Cal Home and Community-Based Services.

Rapid Cycle Polling to Understand the Impact of Cal MediConnect on California's Dual Eligible Population

FIELD RESEARCH CORPORATION

\$349,981

12 months

PUBLIC CONSULTING GROUP

\$143,100

12 months

This project created a rapid-cycle polling strategy for Cal MediConnect beneficiaries to gauge their confidence in and continuity of care. Public Consulting Group provided project management and technical assistance on data extraction and Field Research Corporation conducted the polling.

Implementing New Systems of Integration for Dual Eligibles - Phase II

CENTER FOR HEALTH CARE STRATEGIES

\$449,183

18 months

Co-funded with The Commonwealth Fund, the Center for Health Care Strategies provided national technical assistance to a dozen early adopter states (including California) that are implementing integrated dual eligible pilot programs.

Community of Constituents Initiative

GOVERNMENT ACTION COMMUNICATION INSTITUTE

\$474,048

ALAMEDA COUNTY MEALS ON WHEELS (Alameda County)

\$48,000

ALZHEIMER'S DISEASE AND RELATED DISORDERS ASSOCIATION, ORANGE COUNTY CHAPTER (Orange County)

\$48,000

CAMARILLO HEALTH CARE DISTRICT (Ventura County)

\$48,000

CASTLE KEEP (Fresno, Kings, Madera, Tulare Counties)

\$8,000

DEPARTMENT OF AGING AND ADULT SERVICES (San Francisco County)

\$48,000

FREED/ADRC OF NEVADA COUNTY (Nevada, Sierra Counties)

\$6,750

HEALTHY AGING ASSOCIATION (Stanislaus County)

\$47,981

INDEPENDENT LIVING RESOURCE CENTER, INC. (Ventura, Santa Barbara, San Luis Obispo Counties)

\$8,000

INDEPENDENT LIVING SERVICES OF NORTHERN CALIFORNIA (Butte, Glenn, Modoc, Plumas, Shasta, Sierra, Siskiyou, Tehama, Trinity Counties)

\$8,000

ON LOK, INC. (San Francisco, Alameda, Santa Clara, San Mateo, Contra Costa, Marin, Napa, Solano, Sonoma Counties)

\$8,000

REHABILITATION SERVICES OF NORTHERN CALIFORNIA (Contra Costa County)

\$8,000

RIVERSIDE COUNTY OFFICE ON AGING (Riverside County)

\$8,000

SAN DIEGO COUNTY, HEALTH & HUMAN SERVICES AGENCY, AGING & INDEPENDENCE SERVICES (San Diego, Imperial Counties)

\$48,000

SAN MATEO COUNTY AGING AND ADULT SERVICES (San Mateo County)

\$6,400

SENIORS COUNCIL OF SANTA CRUZ & SAN BENITO COUNTIES (Santa Cruz, San Benito, Monterey Counties)

\$7,991

ST. BARNABAS SENIOR CENTER OF LOS ANGELES (Los Angeles County)

\$48,000

THE HEALTH TRUST (Santa Clara County)

\$48,000

YOLO HEALTHY AGING ALLIANCE (Yolo County)

\$44,502

24 months

The Community of Constituents Initiative is a statewide movement made up of the Sacramento-based California Collaborative on Long-Term Services and Supports and 18 Regional Coalitions. With over 500 member organizations and an additional 700 affiliated member groups, the Initiative worked to transform the state's system of care so that all Californians can age with dignity, choice, and independence.



Grants List for Thematic Goal 2: Person-Centered Care

Dignity-Driven Decision-Making Final Phase

NEXERA, INC.

\$49,000

7 months

This project supported the engagement of Dr. Bruce Vladeck in the Foundation's Dignity-Driven Decision-Making (DDDM) initiative. Dr. Vladeck co-authored an article on DDDM as well as planned and facilitated the final in-person meeting of the learning collaborative comprised of West Coast health care leaders in aging and long-term care.

Aging and Long-Term Care Coverage for Hispanic Community

UNIVISION NETWORK

\$215,482

12 months

This project produced original editorial content around aging with dignity for Spanish-speaking audiences online and on broadcast television.

Identifying Successful Approaches to Person-Centered Care Coordination

AMERICAN GERIATRICS SOCIETY

\$227,194

12 months

This project developed consensus among national experts to define person-centered care, describe its core characteristics, and make a clinical argument for such care that can serve as the national standard.

Kaiser Health News

HENRY J. KAISER FAMILY FOUNDATION

\$500,000

24 months

This project produced a body of editorial content about long-term care for distribution through Kaiser Health News and its affiliated partners.



Grants List for Thematic Goal 3: Long-Term Care Financing

Planning Grant to Establish a One-Stop Shop for Modeling LTSS Policy

THE URBAN INSTITUTE

\$34,999

2 months

This project completed a planning grant for the development of a realistic set of cost estimates and economic impact analyses of core policy options in order to provide a common basis for political discussions on long-term care financing.

Long-Term Care Model Project Facilitation

ANNE TUMLINSON INNOVATIONS, LLC.

\$171,800

12 months

This project provided facilitation services to help develop a realistic set of cost estimates and economic impact analyses of core policy options to provide a common basis for political discussions on long-term care financing.

Bipartisan Strategies for Sustainable Long-Term Care Financing

BIPARTISAN POLICY CENTER

\$298,305

18 months

Through this project, the Bipartisan Policy Center established the Long-Term Care Initiative to develop proposals to address the challenges in financing and delivering long-term services and supports.

Long-Term Care Employer Workgroup

LONG TERM QUALITY ALLIANCE

\$300,000

12 months

This project established a work group for national employer and benefits associations to discuss policy options for addressing the nation's long-term care financing crisis.

Establishing a One-Stop Shop for Modeling LTSS Policy

THE URBAN INSTITUTE

\$420,000

12 months

Urban Institute, in partnership with Milliman, Inc., developed a realistic set of cost estimates and economic impact analyses of core policy options to provide a common basis for discussions on long-term care financing.

Aging with Dignity Content for La Opinión

IMPREMEDIA

\$73,326

14.5 months

This project created Aging with Dignity content for La Opinión's Spanish-speaking audiences for distribution both in print and via a special section on its website.

Raising Awareness and Visibility of Long-Term Care

NEXT AVENUE – TWIN CITIES PUBLIC TELEVISION

\$195,000

12 months

This project produced original coverage of long-term care issues for distribution online and through a special section on its website. Additionally, two free e-books on aging and long-term care were produced and distributed through the PBS member stations nationally.

Expanded Long-Term Care Media Coverage

PBS NEWS HOUR – GREATER WASHINGTON EDUCATIONAL TELECOMMUNICATIONS ASSOCIATION (WETA)

\$275,000

12 months

This project continued PBS NewsHour's "Taking Care" series of editorial content around aging with dignity and long-term care. Content was distributed and featured online including a blog and infographics.

Long-Term Care Public Opinion Research and Dissemination

AP-NORC Center for Public Affairs Research

\$907,355

12 months

This project established three years of annual long-term care polling by the AP-NORC Center for Public Affairs Research, with results distributed through the AP's media network.

Financial Statements

Statements of Financial Position

As of December 31,	2014	2013
Assets		
CURRENT ASSETS:		
Cash and cash equivalents	\$2,557,009	\$6,127,160
Investments	208,602,675	202,326,596
Interest and dividends receivables	198,805	243,382
Prepaid expenses and other current assets	6,596	10,075
Total current assets	211,365,085	208,707,213
PROPERTY AND EQUIPMENT, NET	64,836	175,654
INVESTMENTS	541,388	437,437
DEPOSITS AND OTHER ASSETS	18,072	16,191
Total Assets	\$211,989,381	\$209,336,495
Liabilities and Net Assets		
CURRENT LIABILITIES:		
Accounts payable and accrued expenses	\$150,417	\$152,705
Accrued payroll and related benefits	596,802	612,745
Grants payable	2,074,897	1,726,671
Due to parent and affiliates	8,852	6,739
Total current liabilities	2,830,968	2,498,860
DEFERRED COMPENSATION	541,388	437,437
GRANTS PAYABLE	949,348	100,000
Total liabilities	4,321,704	3,036,297
COMMITMENTS AND CONTINGENCIES		
NET ASSETS	207,667,677	206,300,198
Total Liabilities and Net Assets	\$211,989,381	\$209,336,495

Statements of Activities and Changes in Net Assets

For the years ended December 31,	2014	2013
NET REVENUES – INVESTMENT INCOME	\$19,971,588	\$10,030,710
OPERATING EXPENSES:		
Grants donation expense	6,373,692	2,995,357
Program expense	3,987,067	4,498,084
General and administrative expense	1,362,196	1,457,504
Depreciation and amortization	119,996	125,971
Total operating expenses	11,842,951	9,076,916
CHANGE IN NET ASSETS FROM OPERATIONS	8,128,637	953,794
CHANGE IN UNREALIZED GAIN (LOSS) ON INVESTMENTS – NET	(6,761,158)	19,666,289
INCREASE IN NET ASSETS	1,367,479	20,620,083
NET ASSETS – BEGINNING OF YEAR	206,300,198	185,680,115
Net Assets - end of year	\$207,667,677	\$206,300,198



Notes to Financial Statements

For the years ended December 31,	2014	2013
CASH FLOWS FROM OPERATING ACTIVITIES:		
Change in net assets	\$1,367,479	\$20,620,083
Adjustments to reconcile change in net assets to net cash used in operating activities:		
Depreciation and amortization	119,996	125,971
Net realized and unrealized gain on investments	(7,335,280)	(24,631,097)
Changes in operating assets and liabilities:		
Interest and dividend receivables	44,577	(62,591)
Prepaid expenses and other current assets	3,479	1,144
Deposits and other assets	(1,881)	-
Accounts payable and accrued expenses	(2,288)	(72,947)
Accrued payroll and related benefits	(15,943)	109,733
Grants payable	1,197,574	(1,413,160)
Deferred compensation	103,951	124,316
Due to parent and affiliates	2,113	(8,652)
Net cash used in operating activities	(4,516,223)	(5,207,200)
CASH FLOWS FROM INVESTING ACTIVITIES:		
Payments for property and equipment	(9,178)	-
Purchase of short-term investments	(87,651,729)	(117,497,915)
Sales, maturities, and redemptions of short-term investments	88,710,930	123,032,615
Purchase of long-term investments	(103,951)	(74,404)
Net cash provided by investing activities	946,072	5,460,296
NET INCREASE (DECREASE) IN CASH AND CASH EQUIVALENTS	(3,570,151)	253,096
CASH AND CASH EQUIVALENTS – BEGINNING OF YEAR	6,127,160	5,874,064
Cash and cash equivalents - end of year	\$2,557,009	\$6,127,160

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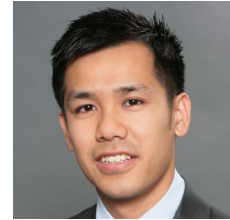
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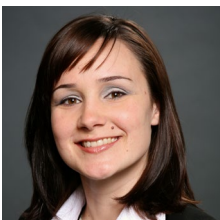


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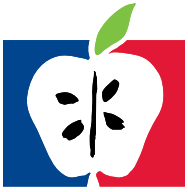
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