



BAY AREA SENIOR HEALTH POLICY FORUM

FEBRUARY 20, 2014 | SOUTH SAN FRANCISCO CONFERENCE CENTER

PROGRAM

WELCOME TO THE 2014 BAY AREA SENIOR HEALTH POLICY FORUM!

"Local Innovations Amid a Changing Health Reform Environment"

On behalf of our planning committee who have been working over the last year to develop today's program, we extend a warm welcome to you.

This is the time to come together. Senior service providers, senior advocates and policymakers from across the greater Bay Area can find a common voice for vitally needed health policies for California's seniors.

California's over-65 population is rapidly increasing and will double in the next two decades. The economic and political environments are forcing our organizations and communities to experience funding cuts and dwindling resources which are needed to provide services to Bay Area seniors. We must strengthen the safety net for them now!

Building upon our first Bay Area Senior Health Policy Forum, held in Oakland in 2009 and our second in 2011, each with over 200 participants, we have expanded our outreach to more Bay Area counties. We look forward to this morning's presentations from representatives at the federal, state, and local levels who will discuss current policy, funding and technology innovations. Our afternoon workshops, facilitated by Bay Area leaders, will explore new innovations and collaborations between partners to address a stronger future, even in the face of current challenges. What can each of us do to effectuate the needed changes?

The needs are real and the environment potentially daunting. Together, we can find answers. We are pleased you are here and that we have an opportunity to strengthen our resolve, knowledge, and advocacy skills.

Sincerely yours,

Linda Trowbridge, CEO
Center for Elders' Independence

Robert Edmondson, CEO
On Lok Lifeways

**TO INSPIRE, EDUCATE AND ENGAGE ADVOCATES, PROVIDERS, POLICYMAKERS AND OTHER
STAKEHOLDERS IN OUR EFFORT TO STRENGTHEN THE SAFETY NET FOR BAY AREA SENIORS**

CONFERENCE SCHEDULE

8:00 a.m. REGISTRATION, LIGHT BREAKFAST, & NETWORKING

9:00 a.m. WELCOME & MORNING PLENARY

LINDA TROWBRIDGE CEO, Center for Elders' Independence

ROBERT EDMONDSON CEO, On Lok Lifeways

9:15 a.m. OPENING REMARKS: SETTING THE STAGE

DR. CHERYL PHILLIPS Senior Vice President, Public Policy and Advocacy, LeadingAge California

9:45 a.m. KEYNOTE SPEAKER

SUSAN REINHARD Senior Vice President, AARP and
Director, AARP Public Policy Institute

BREAK FROM 10:30-10:45

10:45 a.m. GENERAL SESSION

Moderator: **Dr. Cheryl Phillips**

BILL HARRISON Mayor, City of Fremont

STEPHEN JOHNSTON Co-Founder, Aging 2.0

JOSHUA SIMON East Bay Asian Local Development Corporation (EBALDC)

ED ORTIZ Health Plan of San Mateo

12:00 p.m. NETWORKING LUNCH

BREAK FROM 12:45 TO 1PM

1:00 p.m. BREAKOUT SESSIONS

HOUSING AND SUPPORTIVE SERVICES

Moderator: **Joshua Simon**, Executive Director, EBALDC

Val Agostino, Vice President, San Francisco, Mercy Housing

Kevin Gerber, CEO, Episcopal Senior Communities

Chris Hess, Director of Resident Services, Satellite Affordable Housing Associates

Dustin Harper, Vice President of Community Living Services, Institute on Aging

William F. Pickel, Executive Director, West Bay Housing Corporation

ADVOCACY PERSPECTIVES: VOICES FROM LOCAL ADVOCATES & LEGISLATIVE STAFF

Moderator: **Dion Aroner**, former California Assemblymember

Jessica Bartholow, Legislative Advocate, Western Center on Law & Poverty

Elisabeth Jewel, Partner, AJE

Mark Chekal-Bain, District Director, Assemblymember Nancy Skinner's Office

Lori Andersen, Director of Health Aging, The Health Trust

PROMISING PRACTICES IN PREPARING FOR HEALTH REFORM: VIEW FROM GROUND ZERO

Moderator: **Karen Grimsich**, Aging and Family Services Administrator, City of Fremont

Corinne Jan, CEO, Family Bridges, Inc

Debbie Toth, CEO, Rehabilitation Services of Northern California

Carrie Wong, Director of Long Term Care Operations, San Francisco Department of Aging and Adult Services

Grace Li, COO, On Lok Lifeways

LEVERAGING TECHNOLOGY

Moderator: **Joanne Handy**, President and CEO, LeadingAge California

Stephen Johnston, Co-Founder, Aging2.0

David Lindeman, Director, Center for Technology and Aging

Joe Gerardi, Senior Vice President of IT & CIO, ABHOW

BREAK FROM 3:00-3:15

3:15 P.M. SESSION REPORTS: CONNECTING THE DOTS

4:00 P.M. WINE & CHEESE NETWORKING RECEPTION

WELCOME



LINDA TROWBRIDGE became CEO of Center for Elders' Independence in July 2013, bringing 30 years of health care management experience and a longtime interest in the PACE model of integrated care. She has been involved strategically and as an operational leader with large national and regional health care systems in most areas of the health care arena, including delivery systems with acute care hospitals, physician groups, home care and hospice, long term care, and managed care.

Most recently, she was a Principal at Health Management Associates, Inc. where she worked with integrated organizations, housing, health plans and community-based organizations and responded to opportunities and challenges created through the Affordable Care Act. Prior to that, she was with Kaiser Permanente for ten years, where she served the last seven as the Executive Director of the Continuum for Northern California and was responsible for establishing strategic, financial, and operational direction for services managed through the continuum of care and for efficiencies in the hospitals. Prior to that position, she served as the Continuing Care Leader for the North East Bay for Kaiser Permanente.

Linda has a record of designing new organizational structures and models of care that improve efficiency, save costs, raise quality and meet regulatory standards. Earlier in her career, she was the Regional Vice President for Strategic Planning and Business Development for the St. Joseph Health System in northern California and also the CEO of St. Joseph Home Care. She also worked with Catholic Healthcare West (now Dignity Health) and the Sisters of Providence Health Systems.

She earned her Master's degree in Business Administration at San Francisco State University, and her Bachelor of Arts degree in Economics at the University of Colorado.

Center *for* Elders' Independence

Your life just got better



ROBERT EDMONDSON is the CEO for On Lok, Inc., He is responsible for the overall management of each of the On Lok, Inc., corporations, and he reports to the Boards of Directors. Bob joined On Lok, Inc. in 2005.

He has experience in government and the private sector. He managed government agencies in Nevada and has also led non-profit and for-profit HMO's in Northern California. He was the President and CEO of Bridgeway Plan for Health based in San Francisco and Omni Healthcare based in Sacramento. Bob worked in Brazil for four years and was responsible for the development of innovative health care programs there. He has experience with Medi-Cal and Medicare. He serves on the Board of Directors of the John Muir Mt. Diablo Health Network.

Bob attended Stanford, where he received his undergraduate degree, and he went on to get his J.D. at Stanford Law School. He is a licensed attorney in California and Nevada.



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MORNING PLENARY



DR. CHERYL PHILLIPS is LeadingAge's senior vice president for advocacy. She oversees the organization's public policy development, government relations and advocacy efforts to benefit LeadingAge's not-for-profit members and the people they serve.

Dr. Phillips previously served as chief medical officer for On Lok Lifeways, the country's first Program of All-inclusive Care for the Elderly (PACE) program. In this role, she provided medical leadership for On Lok's 5 corporations and was responsible for medical policy and oversight of all medical affairs and clinical functions for both employed and contracted medical providers. She also served as the chief medical officer for Sutter Select and Medical Director, Chronic Disease Management, for the Sutter Health System. Sutter Health System is a network of doctors, hospitals and other health providers who serve more than 100 communities in Northern California.

Dr. Phillips has served as chair of the board of directors and is past-president of both the American Geriatrics Society and the American Medical Directors Association, the physician organization for long-term care. She has also served on the California Commission on Aging, as a delegate to the White House Conference on Aging, and a Primary Care Public Policy Fellow at the U.S. Department of Health and Human Services.

Dr. Phillips' post-graduate training includes a family practice residency and geriatrics fellowship at the University of California, Davis Medical Center. She was awarded her doctorate from Loma Linda School of Medicine, Loma Linda, California, and her bachelor's degree in biology from the University of the Pacific in Stockton, California. Dr. Phillips' certifications include American Board of Family Practice, Certificate of Added Qualifications in Geriatrics and Diplomate and National Board of Medical Examiners.



SUSAN REINHARD, RN, PhD, is a Senior Vice President at AARP, directing its Public Policy Institute, the focal point for public policy research and analysis at the state, federal and international levels. She also serves as the Chief Strategist for the Center to Champion Nursing in America at AARP, a national resource and technical assistance center created to ensure that America has the nurses it needs to provide care both now and in the future.

Dr. Reinhard is a nationally recognized expert in health and long-term care policy, with extensive experience in conducting, directing and translating research to promote policy change. Prior to AARP, Dr. Reinhard served as a Professor and Co-Director of Rutgers Center for State Health Policy where she directed several national initiatives to work with states to help people with disabilities of all ages live in their homes and communities. Previously, she served three governors as Deputy Commissioner of the New Jersey Department of Health and Senior Services, where she led the development of health policies and nationally recognized programs for family caregiving, consumer choice and control in health and supportive care, assisted living and other community-based care options, quality improvement, state pharmacy assistance, and medication safety. She also co-founded the Institute for the Future of Aging Services in Washington, DC and served as its Executive Director of the Center for Medicare Education.

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GENERAL SESSION



MAYOR BILL HARRISON, CITY OF FREMONT, Mayor Harrison's passion for public service speaks for itself. Prior to becoming Mayor, he served as service Chair for the Fremont Kiwanis Club and as Board Chair and Treasurer of Kidango, the largest nonprofit provider of subsidized child care in the city. He currently serves on the board of Boldly Me, which helps build people's self-esteem. A proponent of older adults in the community, he strongly supports Fremont's policy to become an Aging-Friendly Community.



STEPHEN JOHNSTON is an innovation consultant, author and a globally-minded social entrepreneur.

Stephen is co-author of Growth Champions, co-founder of the Innovation Leaders Fund, founder Fordcastle, an innovation consultancy and serves on the board of the Older Adults Technology Services. He has consulted to several F500 companies, including Nokia, Vodafone, Intercontinental Hotels Group, Bertelsmann and Daimler.

A native of the United Kingdom, Stephen has lived in Belgium, Finland, the UK and the US. He earned his MA in Economics from Cambridge University and his MBA from Harvard Business School, where he was a Fulbright Scholar.



JOSHUA SIMON has been dedicated to building vibrant healthy neighborhoods throughout his career. Prior to becoming the Executive Director for EBALDC, Joshua was Director of Real Estate Consulting at the Northern California Community Loan Fund (NCCLF), where he helped nonprofits deepen their impact in the community by better aligning their programs with their facilities. From 1994–2006, Joshua worked as Senior Project Manager and then Director of EBALDC's Real Estate Development Department, overseeing the development of major mixed-use complexes that combine affordable rental apartments with community and retail facilities benefitting the broader community. These include Swan's Market, San Pablo Hotel, Hismen Hin-Nu Terrace Apartments, and Avalon Senior Housing, among others. Joshua also brings experience working with Innovative Housing, Project Artaud and Chinatown Community Development Center. Throughout his career, Joshua has been an active civic leader, serving for 11 years on the board of the Emeryville Unified School District and various education and housing committees. He also serves as Vice President of Emeryville's Redevelopment Successor Agency Oversight Committee. Joshua holds a BA in Architecture from the University of California, Berkeley and a Master of Science in Real Estate Development from the Massachusetts Institute of Technology.



ED ORTIZ joined HPSM in 2012 as Director of Provider Network Development and Services. In this role, Ed is expanding HPSM's provider network in preparation for health care reform implementation and pursuing new partnerships and initiatives with local community-based organizations. Ed has an extensive background in procurement and contracting, most recently as the Associate Director of Commercial Procurement for Genentech.

Prior to joining HPSM, Ed worked as a consultant with both HPSM and the San Mateo County Health System, assisting with the preparation of the Duals Demonstration Project and long-term care integration. Ed holds a Bachelor of Science degree in Business from Northern Illinois University.

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BREAKOUT SESSIONS

Housing and Supportive Services

JOSHUA SIMON (See General Session)



VALERIE AGOSTINO is the Senior Vice President, Healthcare and Housing for Mercy Housing, a national non-profit affordable housing organization.

Val began her career in affordable housing and community services in San Francisco in the late 1970's with Catholic Charities, developing opportunities for very low income, frail elders to live independently in a service enriched supportive community setting.

In 1994, Val joined the staff of Mercy Housing California as the Director of Property Management for the then nascent California organization. In 2001, she was named Chief Operating Officer for Mercy Housing California and spent the following twelve years overseeing various community development, real estate, and resident service activities throughout the state of California.

She was recently promoted to her current position as Senior Vice President, Healthcare and Housing for the national Mercy Housing organization and is focused on affordable housing as a platform for improved health outcomes for residents.

Current affiliations: Commissioner for the Housing Authority for the City of Berkeley, Commissioner for the City of San Francisco's Long Term Care Coordinating Council, Member of the City of San Francisco's Dementia Task Force.

Val has a BA from the University of Massachusetts and completed the Achieving Excellence in Community Development Program at the Kennedy School of Government, a Program of Harvard University and Neighborworks.



KEVIN GERBER is President and CEO of Episcopal Senior Communities (ESC), a not-for-profit organization providing housing and services to older adults in northern California. ESC is headquartered in Walnut Creek, California, and operates six continuing care retirement communities and four affordable housing communities, as well as a broad array of community-based programs.

Prior to joining ESC in 2005, Mr. Gerber held the position of President and CEO of The Episcopal Home Communities in Alhambra, California since 2001. He also served as Vice President of Operations at The Internext Group (now Front Porch) in Burbank, California and held a number of positions at California Lutheran Homes from 1987 until 1999, including Chief Operating Officer.

Mr. Gerber is a widely respected senior executive in the continuing care retirement community field. He has served several terms as a Director of LeadingAge California and as a member of the House of Delegates of American Association of Homes and Services for the Aging (now known as LeadingAge). Mr. Gerber's involvement with the Continuing Care Accreditation Commission includes two terms as a Commissioner and many years as an evaluator. He serves as a volunteer board member for several non-profit organizations.

Mr. Gerber received his B.S. in Business Administration in 1977 from the University of Minnesota, Minneapolis, and graduated with a M.P.A. in Health Services Administration in 1988 from the University of Southern California; he holds a certificate in Long-Term Care Administration, also from USC.

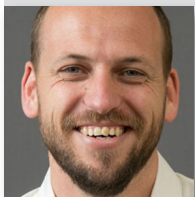
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BREAKOUT SESSIONS (CONTINUED)

Housing and Supportive Services



CHRIS HESS is the Director of Resident Services at Satellite Affordable Housing Associates (SAHA), a nonprofit affordable developer based in Berkeley with over 2,700 low-income residents, primarily in the East Bay. SAHA has developed and currently manages and provides services for 56 buildings that house seniors, families, transition age youth, people with mental health disabilities and people with developmental disabilities. The organization employs 25 service and activity coordinators in its senior buildings and five drivers in its transportation service to help seniors age in place, maintains a vibrant volunteer program with 30 volunteers, and additionally contracts or partners with organizations such as Toolworks, Inc., Lifelong Medical Care, Fred Finch Youth Center, Abode, and others to serve residents with special needs. Chris joined SAHA in 2013 as Associate Director of Resident Services, overseeing services in the senior housing portfolio, and was promoted to Director of RS in February 2014. He was with Resources for Community Development, another Berkeley nonprofit developer, for five years including three years as Director of Resident Services, overseeing services in supportive housing for formerly homeless people and in family and senior housing. Some of his accomplishments included the incorporation of Mental Health Services Act funding, partnerships and housing units into RCD's multifamily buildings, expanding partnerships and services in RCD's supportive housing SROs, and establishing community centers and youth programs at multi-family sites. Before his time at RCD, Chris worked in advocacy and fundraising related to community development, and in social services for persons with severe physical disabilities. He has also volunteered abroad at nonprofit organizations in India, Colombia, and Vietnam, and celebrates the multicultural environment among SAHA diverse resident population.



DUSTIN HARPER serves as IOA's Vice President of Community Living Services. For the past ten years, Dustin has managed a variety of long term care programs serving low income seniors and people with disabilities. He has worked in the private sector, the San Francisco Department of Public Health, and now in the non-profit setting at IOA. Since joining IOA in 2009, Dustin has managed one of IOA's PACE programs and now oversees a number of care management programs including MSSP, Community Living Fund, and Linkages. Dustin has a BA in Economics from UCLA and an MBA from San Francisco State University.



WILLIAM F. PICKEL has served as West Bay Housing's Executive Director since November 2007. During his tenure he has led West Bay's growth from a 2-employee, 3-property start-up into an innovative supportive housing partner in state-wide deinstitutionalization, community care, and homeless housing initiatives, with over 45 full-time employees working in its 80 owned and managed properties, and in-house development, property management, housing services, and clinical case management teams in San Francisco and Los Angeles. Specializing in small and scattered-site supportive housing, West Bay currently houses or provides housing support to over 750 individuals, with contracts to serve roughly 3,000 more during the next few years. Prior to joining WBHC, Mr. Pickel served as Director of Housing Development at CCH, securing \$200M+ in federal, state, local and private funding in support of over 20 multifamily developments including HUD 202 and LIHTC projects, nearly doubling the 40-year-old agency's owned portfolio in 7 years. Mr. Pickel holds an M.A. in Religious Studies from Boston University, a B.A. in Literature from the State University of New Jersey, and an Advanced Affordable Housing Development Training Institute Certificate from the Local Initiative Support Corporation.

BREAKOUT SESSIONS (CONTINUED)

Advocacy Perspectives: Voices from Local Advocates & Legislative Staff



DION ARONER is deeply rooted in California government. After six years as a State Assemblywoman and 25 years as Chief of Staff to her predecessor, Tom Bates, she knows how to get things done in state government. She is an undisputed expert in state budget and human services issues, and has the institutional memory to help clients successfully navigate the Legislature and Administration.

She began her career as a social worker for Alameda County and developed her leadership skills at an early age by becoming the first woman president of Service Employees International Union 535.

Dion is a native San Franciscan, a proud graduate of UC Berkeley, and a long time resident of the East Bay. She serves on the Boards of Freight and Salvage (a folk music venue in Berkeley), Seneca Center (serving severely emotionally disturbed children), and the Berkeley Film Foundation (supporting documentary filmmakers in the East Bay.)



JESSICA BARTHLOW is a legislative advocate at the Western Center on Law and Poverty with nearly two decades of experience in anti-poverty organizing, advocacy and program development at the local, state and national level. Jessica has co-authored several advocate and program guides and led coalitions to support the passage of several pieces of signed legislation that improve public benefits delivery, consumer protections and financial empowerment for low-income Americans. Jessica holds a Master's Degree in Political Science and is the 2012 recipient of the Wellstone – Wheeler National Anti-Hunger Advocate of the Year Award.



ELISABETH JEWEL has strong ties to the East Bay where she has worked in campaigns and for elected officials for the past thirty years. She combines government, community and media relations skills to offer clients a broad selection of services. Her long association with local opinion leaders and versatile skills helps clients be successful from boardrooms to backrooms.

She is a long-time board member of Fred Finch Youth Center, and an active volunteer with Girl Scouts, and Center for Early Intervention on Deafness (CEID), along with numerous political causes and candidates.

Elisabeth grew up on both coasts, graduating from UC Berkeley.

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BREAKOUT SESSIONS (CONTINUED)

Advocacy Perspectives: Voices from Local Advocates & Legislative Staff



MARK CHEKAL-BAIN serves as District Director for Assemblymember Nancy Skinner. Prior to working for Ms. Skinner, Mark served in community/government relations at Lawrence Berkeley National Laboratory, as Special Assistant to former State Attorney General Bill Lockyer and as legislative consultant for the California State Assembly. He served in the Capitol office of then-Assemblymember Jack Scott. Mark serves on the AC Transit bus system Parcel Tax Fiscal Oversight Committee, volunteers on the advisory boards of an Oakland agency serving families with children with special needs and Women Against Gun Violence in Los Angeles. He also runs his son's annual school auction. Mark holds a Bachelors in Business Administration from the University of Michigan and a Masters of Public Health from UC Berkeley.



LORI ANDERSEN, M.P.A. oversees The Health Trust's work in the area of Healthy Aging, working to ensure that older adults spend more years in good health and engaged as vital members of our community.

Lori Andersen is a Silicon Valley leader on issues related to healthy aging. As The Health Trust's Director of Healthy Aging, she has focused on expanding evidence-based health promotion programs, building integrated care systems and advocating for public policies that support the health of older adults.

Lori served for eight years as Director of Planning for the Council on Aging Silicon Valley, responsible for assessing the needs of older adults and building community capacity to address them. In this role she also helped to expand case management programs in Santa Clara County and launched the Health Insurance Counseling & Advocacy Program (HICAP).

As Director of the Bay Area Independent Elders Program (BAIEP), Lori managed a \$6 million grants program for a foundation collaborative that was designed to strengthen and expand local resources for community-based long term care. Prior to joining The Health Trust, Lori administered the grants programs for the Alzheimer's Association of Northern California and Northern Nevada. She has also provided consulting services in program and fund development to non-profits and served as an active volunteer on local boards. She holds a Master's in Public Administration from the University of Southern California and a B. A. in Government & Public Administration from American University in Washington D.C.

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BREAKOUT SESSIONS (CONTINUED)

Promising Practices in Preparing for Health Reform: View from Ground Zero



KAREN GRIMSICH is the Administrator for Aging and Family Services (AFS), a division of the City of Fremont Human Services Department. She has a Bachelor's degree from Monterey Institute of International Studies and a Master's degree in Public Health (MPH) from the University of California, Berkeley. She manages a division with 23 staff, and over 200 senior volunteers and interns, and a three million dollar budget. The programs under her supervision include a multi-service senior center, case management, caregiver support, senior peer counseling, in-home geriatric mental health team, and health promoter team.

She currently serves as treasurer on the board of the Tri-City Elder Coalition, a collaboration of over 60 senior service providers and senior groups advocating for seniors. She is on the Steering Committee for the Alameda County Senior Services Coalition.

She has spent over 25 years working with seniors and at-risk populations in a variety of settings.



CORINNE JAN has been employed at Family Bridges for 22 years. She has been its Chief Executive Officer for 18 of those years. Family Bridges, Inc., is a community based health and social services nonprofit organization serving low income Asian immigrants through six sites. The sites include two Community Based Adult Service centers (CBAS); a childcare center, two well senior centers, and a social services center.

Corinne's 35 year career as a public health nurse/administrator has been heightened by her experience in and passion for caring for chronically ill frail elders. She previously worked as an adult day healthcare center nurse and then the Director of Nursing for On Lok Senior Health Services; as the Director of Nursing for Garfield Geropsychiatric Hospital and in her current position oversees two of the largest Community Based Adult Day Services (CBAS) centers in California.

She is an active member of the Alameda County Adult Day Services Network, Senior Services Coalition of Alameda County and currently volunteers as the Board Treasurer for the California Association of Adult Day Services (CAADS) and serves on the Mayor's Commission on Aging for the City of Oakland.



DEBBIE TOTH is a hands-on senior-care executive with extensive experience providing care and innovative services for frail individuals with multiple chronic conditions including Alzheimer's disease, diabetes, heart disease and much more. She is CEO of Rehabilitation Services of Northern California (RSNC), a nonprofit organization helping people age in place with dignity through their four community based service programs. Debbie has been with RSNC for 12 years, beginning as the program director in their multicultural adult day health program. Debbie is passionate about working with seniors and is very involved in

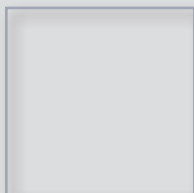
advocacy and other policy efforts to promote a society where everyone can age in place. Debbie is an elected governing board member of the California Association for Adult Day Services (CAADS) as well as an appointed member to the California Health and Human Services' Alzheimer's Disease and Related Disorders Advisory Committee, an elected member of the Paratransit Coordinating Council and an active member of other organizations promoting the same ideals. Debbie earned her degree in Sociology from UC Irvine.

She is an active member of the Alameda County Adult Day Services Network, Senior Services Coalition of Alameda County and currently volunteers as the Board Treasurer for the California Association of Adult Day Services (CAADS) and serves on the Mayor's Commission on Aging for the City of Oakland.

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BREAKOUT SESSIONS (CONTINUED)

Promising Practices in Preparing for Health Reform: View from Ground Zero



CARRIE WONG is the Director of Long Term Care Operations with the San Francisco Department of Aging and Adult Services. One of her current primary responsibilities is overseeing the Community Care Transitions Program contract with Centers for Medicare and Medicaid Services, including program implementation, program evaluation, and quality assurance. She co-chairs the SF Transitional Care Program Steering Committee, and works closely with program partners including 8 hospitals and 8 community-based organizations to achieve San Francisco's transitional care goals. She has worked in social services for over 20 years with both clinical and management experience in diverse fields including community mental health, maternal child health, elder and dependent adult abuse, and long term care issues. She is a Licensed Clinical Social Worker and possesses graduate degrees in Social Welfare and in Public Health.



GRACE LI, MHA is the Chief Operating Officer for On Lok Lifeways. She has been with On Lok since 2001 and is responsible for the oversight of On Lok's eight directly operated PACE centers, service area expansion, and planning and development of new program services. On Lok is currently serving nearly 1300 participants throughout the Greater Bay Area from 10 PACE centers. Grace has led On Lok's PACE Center expansion efforts the past nine years, with a new center that opened in Fremont in July 2012 and the newest East San Jose center (ADHC) to open Spring 2014. She has over 20 years of health administration and operations experience. Having worked in hospitals and managed physician practices, assisted living facilities, and health care consulting, her experience supports the ongoing growth of On Lok Lifeways. In her role, Ms. Li is responsible for the planning and development of new sites and programs, and the operations of On Lok Lifeways' directly-operated centers to ensure the high satisfaction rates of participants, families, and employees. She serves locally on the NICOS Board of Directors and nationally on the National PACE Association (NPA) Board.

JOSHUA SIMON (See above)

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BREAKOUT SESSIONS (CONTINUED)

Leveraging Technology



JOANNE HANDY is the President and CEO of LeadingAge California, which represents the nonprofit senior living field of CCRCs, assisted living, senior housing and community-based services. LeadingAge is the founding sponsor of AgeTech California, a partnership of the senior living and home care fields advancing the use of technologies by providers. Until 2009, she was the President of the Visiting Nurse Association of Boston, the nation's oldest and one of the largest VNAs on the east coast. She is recognized as a national policy leader in the aging and home care fields, having served until 2010 on the national Board of Directors of AARP, representing 36 million Americans 50 years and older. She is the former Chair of the American Society on Aging, the largest gerontological professional association in the country. She was appointed as a delegate to the White House Conference on Aging. She was a Kellogg International Leadership Fellow and is the author of several publications spanning the areas of geriatrics, home care, management, and marketing.



DR. DAVID LINDEMAN, PhD, has worked in the field of aging and long-term care for 30 years as a health services researcher and administrator. In addition to directing the Center for Technology and Aging, he serves as Co-Director of the Center for Innovation and Technology in Public Health, which advances the use of technology to support population health. Prior to joining the Center for Technology and Aging, he was the founder and director of the Mather LifeWays Institute on Aging in Evanston, IL, where he was responsible for developing and implementing evidence-based applied research programs, demonstration projects, education programs and dissemination initiatives. Previously, he held positions as Associate Professor of Health Policy at the Rush Institute for Healthy Aging, Rush University Medical Center and Co-Director of the University of California, Davis Alzheimer's Disease Center. Dr. Lindeman has been a principal or co-principal investigator on numerous federal, state, and foundation-supported studies. He also has been director or co-director of coordinating centers, including those for the National Institute on Aging, California Department of Health Services, and the Brookdale Foundation, and has served on numerous advisory boards and task forces. Dr. Lindeman received his PhD and MSW in social welfare, health services research, and gerontology from the University of California, Berkeley, and his BA from the State University of New York, Binghamton.



JOE GERARDI supports American Baptist Homes of the West (ABHOW) commitment to innovation and excellence in senior living as senior vice president of information technology (IT) and chief information officer. Gerardi holds a bachelor's degree in management from the University of Maryland and brings extensive IT and management experience from his previous work with Hewlett-Packard. During his tenure as vice president of IT at ABHOW, he led the department in developing to a strategic level and took initiatives beyond traditional finance and operational support. Gerardi has represented ABHOW as a commissioner of the Center for Aging Services Technology (CAST), as a steering committee member of AgeTech California and as a member of the CIO Forum of Adaptive Business Leadership.

STEPHEN JOHNSTON (SEE GENERAL SESSION)

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AFTERNOON WORKSHOPS

WORKSHOP #1

HOUSING AND SUPPORTIVE SERVICES

The presenters will address the benefits of adopting a health-based perspective to senior housing and neighborhood/community development. They will draw from their own experience and success in leading the innovative integration of both housing and senior services.

PRESENTERS: Val Agostino, *Vice President, San Francisco, Mercy Housing*
Kevin Gerber, *CEO, Episcopal Senior Communities*
Chris Hess, *Director of Resident Services, Satellite Affordable Housing Associates*
Dustin Harper, *Vice President of Community Living Services, Institute on Aging*
William F. Pickel, *Executive Director, West Bay Housing Corporation*

MODERATOR: Joshua Simon, *Executive Director, EBALDC*

WORKSHOP #2

ADVOCACY PERSPECTIVES: VOICES FROM LOCAL ADVOCATES AND LEGISLATIVE STAFF

An opportunity to dialogue with local advocates and legislative staff who influence policy development and change. We will explore strategies that work and don't work to achieve the goals you seek.

PRESENTERS: Jessica Bartholow, *Legislative Advocate, Western Center on Law & Poverty*
Elisabeth Jewel, *Partner, AJE*
Mark Chekal-Bain, *District Director, Assemblymember Nancy Skinner's Office*
Lori Andersen, *Director of Health Aging, The Health Trust*

MODERATOR: Dion Aroner, *former California Assemblymember*

WORKSHOP #3

PROMISING PRACTICES IN PREPARING FOR HEALTH REFORM: VIEW FROM GROUND ZERO

The speakers will highlight innovative programs being implemented in the Bay Area and present strategies and approaches for counties and community organizations to most effectively implement the new models.

PRESENTERS: Corinne Jan, *CEO, Family Bridges, Inc.*
Debbie Toth, *CEO, Rehabilitation Services of Northern California*
Carrie Wong, *Director of Long Term Care Operations, San Francisco Department of Aging and Adult Services*
Grace Li, *COO, On Lok Lifeways.*

MODERATOR: Karen Grimsich, *Aging and Family Services Administrator, City of Fremont*

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AFTERNOON WORKSHOPS (CONTINUED)

WORKSHOP #4

LEVERAGING TECHNOLOGY

Social media has experienced a meteoric rise over the past few years. Many companies and organizations are now using social media as an effective way of communicating with new stakeholders and maintaining relationships with existing ones. This workshop will explore the latest strategies, tools, and trends in social media as well as some of the compliance risks.

PRESENTERS: Stephen Johnston, Co-Founder, Aging2.0
David Lindeman, Director, Center for Technology and Aging
Joe Gerardi, Senior Vice President of IT & CIO, ABHOW

MODERATOR: Joanne Handy, President and CEO, LeadingAge California

THANK YOU TO OUR PLANNING COMMITTEE:

LINDA TROWBRIDGE | Committee Co-Chair, Center for Elders' Independence
BOB EDMONDSON | Committee Co-Chair, On Lok Lifeways
ALBERTO ORTEGA HINOJOSA, DIANNA GARRETT, ANGELIN BARRIOS | Center for Elders' Independence
EILEEN KUNZ, JENNY O'TOOLE, KATHERINE KELLY | On Lok Lifeways
JOANNE HANDY, JAN GUILIANO, FELICIA PRICE, MARGARET MORNEAU | LeadingAge California
WENDY PETERSON | Senior Services Coalition of Alameda County
LORI ANDERSEN | The Health Trust
KAREN GRIMSICH | City of Fremont Aging and Family Services
LISA MANCINI | San Mateo County Aging and Adult Services
ANNE HINTON | San Francisco Department of Aging and Adult Services

And key staff from the following organizations:

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NOTES:

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