



FOURTH BAY AREA SENIOR HEALTH POLICY FORUM

DECEMBER 3, 2015 | OAKLAND SCOTTISH RITE CENTER, OAKLAND

PROGRAM

WELCOME TO THE 2015 BAY AREA SENIOR HEALTH POLICY FORUM!

"BRIDGING THE AGING SERVICE GAP: AN ECONOMIC IMPERATIVE"

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.

California's over-65 population is going to double in the next 25 years. Improving the quality of life for all Bay Area seniors requires protecting those most vulnerable, as well as looking ahead to anticipate the needs of others down the line. Members of the Bay Area Senior Health Policy Coalition share this imperative.

Comprehensive health and supportive services, which includes all the things that contribute to a senior's health and well-being, is a growing need among California's aging population, and yet service gaps exist. What are the economic repercussions of not finding affordable solutions to help seniors stay living in their communities? What options are there for middle class seniors around long-term supports and services, and how are we building service capacity? How can we pair housing with supportive services or improve access to palliative care to enhance the quality of life for the aging population?

This is the fourth Bay Area Senior Health Policy Forum and we have expanded this event to include representation from more Bay Area counties than ever before. We look forward to hearing from our Keynote Speaker, Mr. David Saÿen, CMS Regional Administrator on where we're at as a country in addressing the needs of seniors on Medicare's 50th anniversary, and a plenary session with state legislators on issues impacting the aging community statewide. Our planning committee has put together some exciting afternoon breakout sessions, and don't miss our closing plenary session where we'll hear from local leaders on what it takes to create meaningful change.

The needs are real and the environment is changing, but together we can find answers. We are so pleased you are here, and hope you enjoy today's program.

Sincerely yours,

Robert Edmondson, CEO
On Lok

Linda Trowbridge, CEO
Center for Elders' Independence

**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

8:30am	REGISTRATION AND BREAKFAST
9:30am	OPENING REMARKS ~ SHPF CO-CHAIRS <ul style="list-style-type: none"> • ROBERT EDMONDSON CEO, On Lok • LINDA TROWBRIDGE CEO, Center for Elders' Independence
9:45am	WELCOMING REMARKS <ul style="list-style-type: none"> • ASSEMBLYMEMBER ROB BONTA • JOSE CORONA Director of Equity & Strategic Partnerships, The Office of Oakland Mayor Libby Schaaf
10:00am	KEYNOTE SPEAKER <ul style="list-style-type: none"> • DAVID SAYËN CMS Regional Administrator, Region IX
10:45am	MAKING AN IMPACT: CHALLENGES AND SUCCESSES IN STATE PUBLIC POLICY <ul style="list-style-type: none"> • ASSEMBLYMEMBER DAVID CHIU • ASSEMBLYMEMBER MARC LEVINE • ASSEMBLYMEMBER TONY THURMOND • DION ARONER Partner, AJE Partners and former California Assemblymember (<i>Moderator</i>)
11:45am	NETWORKING LUNCH
12:30pm	BREAK
12:45pm	CONCURRENT BREAKOUT SESSIONS #1 <ul style="list-style-type: none"> ■ Creating and Maintaining Affordable Housing for Seniors ■ LTSS Financing for the Middle Class: Searching for Solutions ■ Leveraging Community to Enable Individuals to Age in Place
2:00pm	BREAK
2:15pm	CONCURRENT BREAKOUT SESSIONS #2 <ul style="list-style-type: none"> ■ Housing Meet Services, Services Meet Housing; How Do We Make this Relationship Work? ■ Building Capacity for the Future: Innovations within LTSS ■ Initiatives to Improve Access to Quality Palliative Care
3:30pm	BREAK
3:45pm	A DIALOGUE WITH LOCAL LEADERS: HOW DO YOU CREATE MEANINGFUL CHANGE? <ul style="list-style-type: none"> • SUPERVISOR WILMA CHAN Alameda County Board of Supervisors • ELIZABETH GIBBONEY CEO, Partnership HealthPlan of California • JAMES RAMONI Director, Department of Aging and Adult Services, Santa Clara County • ROBERT EDMONDSON CEO, On Lok (<i>Moderator</i>)
4:30pm	NETWORKING RECEPTION

SESSION DETAILS

9:30am – 9:45am | Grand Ballroom, First Floor

OPENING REMARKS FROM SENIOR HEALTH POLICY FORUM CO-CHAIRS

- PRESENTERS:**
- **Robert Edmondson**, CEO, On Lok
and Co-Chair of the Bay Area Senior Health Policy Forum
 - **Linda Trowbridge**, CEO, Center for Elders' Independence
and Co-Chair of the Bay Area Senior Health Policy Forum



ROBERT EDMONDSON is the CEO of On Lok. He is responsible for the overall management of each of the On Lok corporations, and he reports to the Boards of Directors. Bob joined On Lok 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 CEO of Bridgeway Plan for Health based in San Francisco and Omni Healthcare based in Sacramento. Bob worked in Brazil for Aetna International for three 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 John Muir Health in Walnut Creek. He is a founding board member of the California PACE Association, CalPACE. He was a founding board member of the California Association of Health Plans, CAHP, originally called CAHMO. He has served on the Eskaton Board since February 2014.

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.



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. She is currently the Chair for the California PACE Association, CalPACE.

Just prior to her work at CEI, 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.

Previously, Linda was Executive Director of the Continuum for Northern California for Kaiser Permanente. Prior to that position, she served as the Continuing Care Leader for the North East Bay for Kaiser Permanente.

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

SESSION DETAILS (CONTINUED)

9:45am – 10:00am | Grand Ballroom, First Floor

WELCOMING REMARKS

- PRESENTERS:**
- **Assemblymember Rob Bonta**
 - **Jose Corona**, *Director of Equity and Strategic Partnerships, The Office of Oakland Mayor Libby Schaaf*



ASSEMBLYMEMBER ROB BONTA was elected to the California State Assembly's 18th District in 2012, where he represents the cities of Oakland, Alameda, and San Leandro as the first Filipino American elected to the Legislature in the 165-year history of California.

His legal career included work as a Deputy City Attorney for the City and County of San Francisco, where he represented the City and County and its employees, and as a private attorney, where he fought to protect Californians from exploitation and racial profiling. Prior to being elected to the Alameda City Council, Rob served as the Chair of the City of Alameda's Economic Development Commission, and as board president for the Social Service Human Relations Board. As Vice Mayor of the City of Alameda, Bonta strongly supported public safety, fostered economic development, and exercised fiscal responsibility.

Bonta's work to improve the health of Californians began as an elected member of the Alameda Health Care District Board of Directors, where he championed access to quality health care for all – a goal he further pursued his first two years in the Assembly as a member of the Health Committee.

In addition to chairing the Health Committee and the Select Committee on the Status of Boys and Men of Color in California, Bonta chairs the Public Health and Developmental Services Committee and Joint Conference Committee of the second Extraordinary Session. He is also a member of Appropriations, Budget, Budget Subcommittee No. 1 on Health and Human Services, Public Employees, Retirement and Social Security, Joint Legislative Budget, and Joint Legislative Committee on Emergency Management.



JOSE CORONA is the Director of Equity and Strategic Partnerships under Oakland Mayor Libby Schaaf. In this role, Jose serves as senior advisor to the Mayor, with the responsibility of creating, coordinating, and facilitating public/private/philanthropic partnerships that foster equitable opportunities and benefits for the people of Oakland. Prior to this, Jose served as CEO of Inner City Advisors (ICA) and led ICA to becoming a nationally recognized, award-winning organization for its work on scaling small businesses and entrepreneurs as a way to create Good Jobs, especially for people with highest need. Jose is a BALLE (Business Alliance for Local Living Economies) Fellow and serves on the Boards of several organizations including Fund Good Jobs, Net Impact, SPUR Oakland and the YMCA of The East Bay.

10:00am – 10:45am | Grand Ballroom, First Floor

KEYNOTE SPEAKER

- PRESENTER:**
- **Mr. David Saÿen**, *Regional Administrator for Region IX, Centers for Medicare and Medicaid Services*



DAVID SAÿEN (pronounced "SIGN") is the Regional Administrator at the Centers for Medicare & Medicaid Services' San Francisco office. David's team is focused on external and intergovernmental affairs for the San Francisco region that serves over 20 million Medicare, Medicaid, Marketplace, and Children's Health Insurance Program beneficiaries. He brings more than 30 years of Federal experience in health and human services programs to the position. His experience at HHS includes work in Medicare health plan operations, financial management, program integrity, information technology, and public affairs. He earned his MBA in Health Administration from Temple University in Philadelphia.

SESSION DETAILS (CONTINUED)

10:45am – 11:45am | Grand Ballroom, First Floor

MAKING AN IMPACT: CHALLENGES AND SUCCESSES IN STATE PUBLIC POLICY

In this session, attendees will hear from state legislators on what programs and initiatives are currently underway that impact the aging community. The Bay Area has representation at the state level on key Health, Budget and Aging Committees that directly impact Medi-Cal programs the safety-net population, and seniors statewide. Attendees will hear from local legislators on how these Committees are working to address these issues and what they think the future looks like for programs serving seniors statewide.

MODERATOR: **Dion Aroner**, *Partner, AJE Partners and former California Assemblymember*

PRESENTERS:

- **Assemblymember David Chiu**
- **Assemblymember Marc Levine**
- **Assemblymember Tony Thurmond**



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 Safe Kids California.



ASSEMBLYMEMBER DAVID CHIU was elected to the California State Assembly in November 2014. He represents the 17th Assembly District, which encompasses eastern San Francisco. In December 2014, Speaker Toni Atkins appointed Chiu Assistant Speaker pro Tempore for the 2015-16 Legislative session. In Chiu's first year, Governor Brown signed 11 of Chiu's bills.

Before joining the State Assembly, David Chiu served as President of the San Francisco Board of Supervisors for six years. With a reputation as a consensus maker, Chiu was the first Board President in San Francisco history elected by fellow Supervisors to three consecutive terms, and the first Asian American to hold the post. Chiu was first elected Supervisor in 2008 to represent San Francisco's northeast neighborhoods of District 3; he was overwhelmingly re-elected in 2012. As Supervisor, David Chiu authored 110 ordinances across a wide range of policy areas, including affordable housing, job creation, public safety, the environment, health care, transportation, civil rights, ethics and technology.

The son of immigrant parents, David Chiu grew up in Boston and received his undergraduate, law and master's in public policy from Harvard University. In the mid-1990s, Chiu served as Democratic Counsel to the U.S. Senate Constitution Subcommittee and as Senator Paul Simon's aide to the U.S. Senate Budget Committee. Before running for office, Chiu served as a criminal prosecutor, a civil rights attorney and founder of a public affairs technology company.

David Chiu is married to Candace Chen. A third generation San Franciscan, Candace is a public interest lawyer who represents immigrant and foster care youth.



ASSEMBLYMEMBER MARC LEVINE was elected in November 2012 to represent the 10th Assembly District, comprised of Marin County and Southern Sonoma County.

A former San Rafael City Councilmember, Levine has held leadership posts throughout his career helping to develop innovative solutions at the local, state, national and international levels. He currently chairs the Assembly Committee on Water, Parks, and Wildlife. This committee is responsible for overseeing Water Bond expenditures, implementation of a long-term plan to protect our beautiful parks, and protecting endangered species, migratory birds, and other wildlife.

SESSION DETAILS (CONTINUED)

ASSEMBLYMEMBER MARC LEVINE *bio continued...*

In his first term in the Assembly, Levine was the vice-chair of the Local Government Committee and chaired the Assembly Select Committee on Agriculture and the Environment. In 2013-14, Governor Brown signed into law 23 bills authored by Levine including historic Marin County housing legislation. Other laws written by Levine support online education at CSU campuses, increase use of recycled water, increase access to the California Coastal Commission meetings, create new charging stations for electric vehicles, expand markets for local businesses, and protect victims of violent crime.

Levine earned his Master's Degree in National Security Affairs from the Naval Postgraduate School in Monterey, CA, and was recognized with a Special Act Award for his work to promote the elite graduate school around the world. While earning his Bachelor's Degree in Political Science at Cal State Northridge, he was elected Chair of the California State Student Association representing over 400,000 students to the State Legislature and Board of Trustees.

Assemblymember Levine lives in San Rafael with his wife Wendy and their two children.



ASSEMBLYMEMBER TONY THURMOND represents California's 15th Assembly which includes the East Bay communities that stretch along the I-80 corridor from Hercules to Oakland. He serves as Chair of the Budget Subcommittee on Health and Human Services and is a member of the Budget Subcommittee No. 6, Education, Health, Human Services and Labor and Employment.

During the Second Extraordinary Session, he served on the Public Health and Developmental Services Committee. Prior to his election to the Assembly, he served on the Richmond City Council in 2005, the West Contra Costa Unified School District from 2008 to 2012 and served as Senior Director of Community and Government Relations at Lincoln Child Center.

His priorities in the Assembly will be a continuation of his priorities as a non-profit leader, school board member, and as a city councilmember. Specifically, Thurmond plans to focus on improving the local and state-wide economy, improving education from the ground up and preventing crime.

A Fellow in the Annie E. Casey Foundation's Children and Family Fellowship program, Assemblymember Thurmond is a graduate and former student body president of Temple University. Assemblymember Thurmond did his graduate work at Bryn Mawr College (Bryn Mawr, PA) where he received dual Masters Degrees in Law and Social Policy and Social Work. He lives in Richmond, California.

12:45pm – 2:00pm | Breakout Session #1 | Blue Room, Third Floor

CREATING AND MAINTAINING AFFORDABLE HOUSING FOR SENIORS

Recent years have tightened financing streams for traditional affordable senior housing. This has forced developers to become more creative and form new partnerships as they try to build new housing and refurbish housing that is in jeopardy of being closed. It has also forced cities and communities to look for new ideas for low and middle income seniors who do not want to leave their communities but are being priced out of the rental market. Learn what creative ideas are being used in the Bay Area to help seniors stay living in their communities.

MODERATOR: **Dianna Garrett**, *Director of Communication & Planning, Center for Elders' Independence*

PRESENTERS:

- **Leslie Klor**, *HomeShare Program Director, Episcopal Senior Communities*
- **Maricela Narvaez-Foster**, *Director, Alameda County Healthy Homes Department, Community Development Agency*
- **Eve Stewart**, *Director, Housing Development, Satellite Affordable Housing Associates*

SESSION DETAILS (CONTINUED)



DIANNA GARRETT oversees the communications, marketing, and enrollment divisions at Center for Elders' Independence. She came to CEI with a background in marketing, advertising, planning, and project management. She has over twenty years' experience working mainly with HMO organizations such as PacifiCare, CIGNA and Health Net on their senior products. Her passion for integrated long term care developed in 2001 when she struggled with her family to piece together dozens of services for her grandparents when they could not stay at home without additional care. She began looking for ways to become involved and be part of the solution. So, when Dianna started consulting with the Center for Elders' Independence and learned about PACE in 2003, she knew she had found a home. She is a member of the West Contra Costa County Senior Coalition and is on the board of directors of Resources for Community Development – an affordable housing developer in the East Bay. She also serves on the Public Relations Taskforce for both the National PACE Association and CalPACE.



LESLIE KLOR has over twenty-five years of experience as a therapist, mediator, communications specialist and life and business coach. She spent many years working in the corporate world as an employment counselor and manager of a temporary employment agency as well as with the non-profit sector specializing in senior resources and intergenerational housing. Most recently she was the Director of Senior Information and Marin Independent Elders at Whistlestop Senior Center and the Housing Advocate at Marin Housing. Currently, she is the Director of Shared Housing with Episcopal Senior Communities.

Leslie is a graduate of San Francisco State University with a BA in Psychology and has done Graduate work in both Counseling and Mediation. She earned her designation as a Certified Coach from the Coaches Training Institute. She recently completed service as President of the Board of Directors for Mercy Housing and the Northern California Mediation Center.



MARICELA NARVAEZ-FOSTER, PHN, MA, is the Director of the Alameda County Healthy Homes Department where she serves as liaison to the Joint Powers of Authority; the Alameda County Board of Supervisors; and directs a housing, health, and environmental department.

Ms. Foster has extensive experience in health care delivery systems including public health. She has directed and created a wide array of initiatives, public health programs, and boards that serve the community.

Ms. Foster is a graduate of the Harvard School of Public Policy and has worked extensively in creating a systems change approach that advances the integration of health and housing service deliveries. She is a Registered Nurse; holds a Bachelor of Science degree in Health Sciences; and a Masters in Psychology and Counseling. Ms. Foster is a Fellow of the National Hispanic Leadership Institute in Washington, DC.



EVE STEWART has over 14 years' experience in real estate finance and development and has been with SAHA over 10 years. During her tenure, Eve has directly managed or overseen the completion of more than 900 housing units, primarily using tax credit financing combined with additional State and local funding programs. Currently, Eve is responsible for 750 units in SAHA's predevelopment pipeline with total costs of \$280 million. Eve serves on of the board of directors of East Bay Housing Organizations (EBHO), a nonprofit advocacy and policy group and serves on the leadership Board of EveryOne Home, Alameda County's initiative to end homelessness. Eve holds a Masters degree in City & Regional Planning from the University of North Carolina and graduated magna cum laude from Harvard University with a Bachelor's degree in Archaeology. She is a Certified Green Building Professional.

SESSION DETAILS (CONTINUED)

12:45pm – 2:00pm | Breakout Session #1 | Dining Room, Third Floor

LTSS FINANCING FOR THE MIDDLE CLASS: SEARCHING FOR SOLUTIONS

The 2015 LeadingAge Pathways California Community Conversation Project identified a number of public and private options that our state can pursue towards the goal of what California can do to improve financing of LTSS for individuals not eligible for Medi-Cal. The Project has prioritized action steps that are currently underway. Come hear about the plan and share your views on priority actions. Learn about the economic modeling being done nationally to determine the impact, scope, and cost of various LTSS financing options and their impact on state Medicaid budgets. Discuss ways in which county coalitions can be part of these efforts.

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

PRESENTERS:

- Susan DeMarois, *State Policy Director, Alzheimer's Association, California*
- Sarah Steenhausen, *Senior Policy Advisor, The SCAN Foundation*
- Dr. Nina Weiler-Harwell, PhD, *Associate State Director for Advocacy, AARP California*



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. 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.

Joanne is the former President of the Goldman Institute on Aging, an affiliate of the University of California San Francisco, known for its pioneering work in developing community-based services for older adults. She is active nationally in the aging and home care fields, and served on the national Board of Directors of AARP, representing 36 million Americans 50 years and older. Joanne is also on the national Board of the AARP Foundation and is the former Chair of the American Society on Aging, the largest gerontological professional association in the country, and is the past Vice Chair of the Board of the Visiting Nurse Associations of America. She is a former Board member of the National Association for Home Care and Hospice and Chair of their 2005 Annual Convention and also a former Chair of the California Association for Health Care at Home and served on the National Chronic Care Consortium.



SUSAN DEMAROIS serves as state policy director for the national Alzheimer's Association in Sacramento, where she leads local chapter advocacy on legislation, regulation and state budget actions. Prior to joining the Association, Susan worked as a health policy consultant, overseeing projects such as California's State Plan for Alzheimer's Disease. For eight years, Susan managed UC Davis Health System's government and community relations program at the county, state and federal levels. In this role, she collaborated with Dignity Health, Kaiser and Sutter to jointly develop regional community benefit reports. Early in her career, Susan worked for LeadingAge California as their healthcare lobbyist and education director. She started in public policy as a Congressional staffer after graduating from CSU Chico. Susan is committed to the nonprofit and public sectors as

demonstrated by her volunteer work as a board member for the Center for Health Care Decisions and prior service to Pacific Housing and Ronald McDonald House charities.

She was a Kellogg International Leadership Fellow and is the author of several publications spanning the areas of geriatrics, home care, management and marketing.



SARAH STEENHAUSEN provides counsel and guidance as Senior Policy Advisor for The SCAN Foundation regarding state-level initiatives and policy opportunities as well as recommendations for raising awareness and educating state policymakers on issues impacting California's seniors. She joined The SCAN Foundation after serving as assistant secretary for Long Term Care at the California Health and Human Services Agency. In this capacity, she directed efforts of the state Olmstead Advisory Committee, the Alzheimer's Advisory Committee, and served as primary advisor to the secretary on aging and long term care legislative and budgetary measures. Previously, Ms. Steenhausen worked as the assistant director for Strategic Planning at the California Department of Developmental Services. Ms. Steenhausen's legislative experience includes serving as Consultant

to the Senate Subcommittee on Aging and Long Term Care and as consultant to the Senate Health and Human Services Committee.

Ms. Steenhausen holds a Master of Science in Gerontology from the USC Davis School of Gerontology, and a Bachelor of Arts in history from Connecticut College in New London, Connecticut.

SESSION DETAILS (CONTINUED)



DR. NINA WEILER-HARWELL, PhD, has worked at AARP since 1997. She is an Associate State Director for Advocacy for AARP California. Nina has had experience managing both federal and state advocacy campaigns, including Protect Seniors, You've Earned a Say (AARP's national conversation with Americans on the future of Social Security and Medicare), and the passage of the Affordable Care Act.

Nina now oversees California's Caregiving Campaign, playing a lead role in the state office's efforts to create the California Task Force on Family Caregiving (ACR 38-Brown), our collaborative efforts with a variety of partners to make Nurse Practitioner autonomy a reality in California (SB 323-Hernandez) and AARP's educational efforts on Caregiving and Long-Term Care.

Nina earned her MA and Ph.D. from the University of Southern California in Political Science.

12:45pm – 2:00pm | Breakout Session #1 | Gold Room, Fourth Floor

LEVERAGING COMMUNITY TO ENABLE INDIVIDUALS TO AGE IN PLACE

What does it really take to implement aging-friendly community frameworks? A panel with deeply practical experience will help participants explore intentional approaches to engaging community in ways that connect, support and empower older adults.

MODERATOR: **Wendy Peterson**, *Director, Senior Services Coalition of Alameda County*

PRESENTERS:

- **Mayor Ruth Atkin**, *City of Emeryville*
- **Vandana Pant**, *Senior Director Strategic Initiatives, Druker Center for Health Systems Innovation, Palo Alto Medical Foundation*
- **Joann Sullivan**, *Broker, Thornwall Properties*



WENDY PETERSON has worked in the field of aging policy and services for 19 years, after leaving the computer industry where she managed technology development start-ups. Since 2002, Ms. Peterson has directed the Senior Services Coalition of Alameda County, a coalition of community-based organization that, together, provide health and supportive services to over 50,000 seniors throughout the county. The Coalition and its members advocate for policy changes that improve the lives of vulnerable older adults.

Prior to joining SSC, Ms. Peterson served as Marketing/Development Director for Center for Elders' Independence, a Program of All-inclusive Care for the Elderly in Oakland, California. In 2006, she served as Interim Project Director for LifeLong Medical Care's East Bay Benefits Initiative, helping to prepare that community health center for the launch of Medicare's Prescription Drug Benefit, and conducting a series of teleconference trainings that shared LifeLong's best practices with safety net providers throughout California.

Ms. Peterson has been recognized for her advocacy leadership by the Alameda County Board of Supervisors; is the recipient of the 2010 Kenneth Hoh Award for Advocacy from Family Bridges, and was named 2009 Woman of the Year for the 9th Senate District by State Senator Loni Hancock.

Ms. Peterson currently serves as the President of the Board of DayBreak Adult Care Centers, an organization that serves the providers of adult day care and the adults and families they serve. She also serves as Co-Chair of the Tri-City Elders Coalition and serves on the board of the East Bay Foundation on Aging. Ms. Peterson holds a Bachelors degree (cum laude) in English from the University of California at Los Angeles.



RUTH ATKIN joined the Emeryville City Council in November 1999 and has served as Mayor in 2002 and 2006. Ruth has public service experience from the local to the federal level. She began her public service in 1988 when she first worked for Aging and Adult Services of Contra Costa county. She then worked as a federal civil servant in the US Department of Veterans Affairs as a medical social worker and homeless veterans outreach coordinator from 1992-2001. In 2001 she returned to Aging and Adult Services in Contra Costa county where she has served as a program analyst, contracts monitor and interim division manager for the Area Agency on Aging and other programs that support seniors living independently in the community.

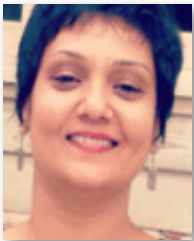
SESSION DETAILS (CONTINUED)

RUTH ATKIN *bio continued...*

Throughout her 19 years as an Emeryville resident Ruth has been completely devoted to building community. In her first campaign she promoted the idea of autonomous neighborhood councils. Since that time a number of residential neighborhood groups and email lists have formed autonomously! Now she is working on interweaving the public institutions serving Emeryville through the model of the Emeryville Centers of Community Life. Ruth serves on the boards of directors of the Emeryville Celebration of the Arts and the Emery Education Fund and has served on the boards of other East Bay nonprofit community organizations.

Ruth's current Emeryville committee work includes the Bicycle/Pedestrian Advisory committee, Housing committee, AC Transit-city liaison committee, Brownfields Task Force, Utility committee, Climate Change Task Force, and the City-Schools committee. She also serves the community on the boards of regional agencies which include the Housing Authority of the county of Alameda, the Alameda county Congestion Management Agency, and the Alameda County Transportation Authority (ACTA). She has been an alternate to the Association of Bay Area Governments executive committee and the Alameda County Transportation Improvement Authority (ACTIA).

Ruth Atkin became happily married to Janet Tobacman in September 2008 after being together for over 10 years. Their home is often the site of various community gatherings.



VANDANA PANT has broad-ranging experience with the nonprofit sector in the US and India. She specializes in creating and implementing scalable models for social impact and organizational growth. Prior to joining the Palo Alto Medical Foundation, she led strategic development at The Health Trust, a Silicon Valley-based operating foundation advancing solutions for health equity and wellness. Vandana has also led capacity building, program development and board relations for diverse Bay Area organizations focused on the arts, civic engagement and social justice. She continues to serve in an advisory role to support mission-driven initiatives.

At the Sutter Health-Palo Alto Medical Foundation's Druker Center for Health Systems Innovation, Vandana leads deployment and operations of the Center's work including program strategy & implementation, evaluation, internships and external relations.

Vandana has a graduate degree in Mass Communications from the Mass Communications Research Center, Jamia University in New Delhi and an undergraduate degree in Psychology from Delhi University.



JOANN SULLIVAN is a full service Realtor® who specializes in working with seniors. She has worked with seniors for over 15 years, first as Clinic Director at Over 60 Health Center and most recently as a Realtor at Thornwall Properties, Inc. in Berkeley. She is a long time volunteer in senior programs including Meals on Wheels, Alameda County Adult Day Health Network and Ashby Village. She was recently elected to the Board of Directors of the East Bay Foundation on Aging.

2:15pm – 3:30pm | Breakout Session #2 | Blue Room, Third Floor

HOUSING MEET SERVICES, SERVICES MEET HOUSING; HOW DO WE MAKE THIS RELATIONSHIP WORK?

This session will explore the current landscape of affordable senior housing and low-income services and how they are or are not coupled. Where coupled, the presenters will examine what works and what is needed moving forward. This session will examine this issue from budgeting and policy perspectives provided by the state and a housing/service provider.

MODERATOR: **Debbie Toth**, *CEO, Rehabilitation Services of Northern California*

PRESENTERS:

- **Hannah Katch**, *Assistant Deputy Director, Department of Health Care Services*
- **Lamar Turner**, *MSW, Founder, ElderFocus*

SESSION DETAILS (CONTINUED)



DEBBIE TOTH fell in love with the aging population in high school working at the Motion Picture and Television Fund's independent senior housing development, The Country House. She continued to work there, driving back on weekends, while earning her degree from UC Irvine. Debbie spent a few years living in Hungary and then worked in financial services. She was missing something in her life and realized it was her beloved "oldies."

Debbie joined RSNC, first as the Program Director of Mt. Diablo Center in 2002 until she was promoted to Executive Director in 2004. In 2009 she began her transition to Chief Program Officer and in 2012, was promoted to CEO. In addition to overseeing all aspects of Mt. Diablo Center and The Bedford Center, Debbie added the Multipurpose Senior Services Program (MSSP), which provides nursing and complex case management to people desiring to remain living in their homes. Debbie also brought the California Community Transitions (CCT) project to RSNC, which identifies people living in healthcare facilities who may safely move back to a community setting (which Debbie fondly refers to as our jail break program). In 2013 the state Department of Health Services designated RSNC as the Care Coordination Agency for the Assisted Living Waiver (ALW) program, which partners with assisted living facilities to help frail adults avoid institutional living.



HANNAH KATCH serves as the Assistant Deputy Director for Health Care Delivery Systems at the California Department of Health Care Services. In this capacity, she oversees the divisions that operate the operations, quality, and monitoring of managed care plans, the long term care program, and the systems of care program for vulnerable populations. Prior to her current position, Hannah spent four years as Senator Franken's senior health policy advisor and primary health care staffer on the Senate Health, Education, Labor, and Pensions (HELP) Committee. She took a leadership role in developing several key pieces of legislation that were passed into law, including the Drug Quality and Security Act of 2013, the Violence Against Women Act of 2013, and the Food and Drug Administration Safety and Innovation Act of 2012, and she also worked closely with Congressional leadership, the U.S. Department of Health and Human Services, and the White House on the implementation of the Affordable Care Act. Prior to her work in the Senate, Hannah worked on health policy issues in various capacities, including positions at the Center for Health Care Quality, the Kaiser Family Foundation, the NIH Office of Research on Women's Health, and the health policy office of the Senate HELP Committee under Senator Ted Kennedy. Hannah has a Master's of Public Policy in Health Policy from George Washington University.



LAMAR TURNER, MSW, has been in the affordable housing business for 22 years and five years ago founded ElderFocus, a company that assists organizations in creating and implementing plans of action to integrate health care and services in affordable housing for lower income older adults.

2:15pm – 3:30pm | Breakout Session #2 | Dining Room, Third Floor

BUILDING CAPACITY FOR THE FUTURE: INNOVATIONS WITHIN LTSS

This session will focus on how various organizations across the state are collaborating and innovating to provide more effective long-term supports and services (LTSS) for the aging and disabled populations - with an emphasis on improving quality of life and community participation, and improving the services and opportunities available for individuals who are managing complex chronic conditions. The session will also share successful advocacy strategies to help you address service gaps and build a stronger LTSS infrastructure within your own community.

MODERATORS: **Amy Andonian**, *President and CEO, Avenidas*

Sonali Parnami, *Program Manager, Healthy Aging, The Health Trust*

PRESENTERS:

- **Lori Andersen**, *Operations Director, Long Term Services and Supports, Santa Clara Family Health Plan*
- **Sandra Carlson**, *Senior Health Services Clinical Manager, Health Plan of San Mateo*
- **Dr. Amy Scribner, PhD**, *San Mateo County Regional Director of Community Living Services, Institute on Aging*
- **Erin Westphal**, *Program Officer, The SCAN Foundation*

SESSION DETAILS (CONTINUED)



AMY ANDONIAN is the President and CEO of Avenidas, a private, non-profit agency that has helped older adults and their families in the community to live well, learn, and maintain their independence over the past 40 years.

Prior to joining Avenidas, Amy served as the Vice President of Home Care & Support Services for Institute on Aging, providing leadership for the agency's fee-for-service home care, care management, fiduciary, and social day services in San Francisco, San Mateo, Santa Clara, and Marin Counties. Before that, she worked for 6 years as the Program Director of Caregiver Services for Catholic Charities of Santa Clara County in San Jose, California.

Amy has extensive knowledge and expertise in the areas of adult day care, home care, family caregiving, dementia care, non-profit program development and management, grant-writing, and social enterprise. She is also an active member of the Aging Services Collaborative of Santa Clara County (ASC) and currently serves on the Board of Directors for the California Association of Adult Day Services (CAADS).

Amy received a Bachelor of Arts degree in Human Biology with concentrations in Public Health and Gerontology from Stanford University. In addition, she is a graduate of Santa Clara University Leavey School of Business's California Program for Entrepreneurship.



SONALI PARNAMI is a program manager at The Health Trust and has been working under the organization's Healthy Aging Initiative since 2014. Sonali supports development and implementation of a variety of projects related to long term services and supports integration and reform. As one of her roles she supports the work of Santa Clara County's Long Term Services and Support Integration Subcommittee, a body of thought leaders and key decision makers in the County charged to integrate and redesign the delivery of quality, medical, behavioral/mental health and social services with a person- and family-centered approach. In addition Sonali also supports the Aging Services Collaborative's regional coalition work on the California Care Initiative (CCI) including CCI outreach efforts and CCI stakeholder engagement activities in Santa Clara County.

Previous to joining the Health Trust, Sonali served as regional consultant to the Department of Health and Human Services' Office of HIV/AIDS's Policy in the New England area and worked on several HIV/AIDS community outreach initiatives and capacity building projects both domestically and internationally. Sonali holds an MPH from Boston University and a BS University of Virginia.



LORI ANDERSEN currently serves as the Operations Director of Long Term Services and Supports (LTSS) at the Santa Clara Family Health Plan, a participating plan in California's Coordinated Care Initiative. For over 30 years, Lori has been a leader in the field of aging working in public, philanthropic and community based organizations primarily in the Bay area. She has managed several key multi-year initiatives including the Bay Area Independent Elders Program, the Santa Clara County Aging Services Collaborative and The Health Trust's Healthy Aging Initiative. She holds an MPA and has worked for two Area Agency(ies) on Aging and the Alzheimer's Association of Northern California. Lori is a strong advocate and partner promoting the integration of services

and supports for older adults in SCC.



SANDRA CARLSON is currently Senior Clinical Manager at the Health Plan of San Mateo. Since April 2014, she has had an active role in the implementation of the Cal Medi-Connect product line for Seniors and Special Needs members residing within San Mateo county. She currently oversees all Utilization management processes for 140,000 of the health plan's total members, as well as the integration of San Mateo county's Aging & Adult Services IHSS and MSSP programs directly into the health plan's Care Coordination initiatives. Ms. Carlson is also involved with the health plan's partnership with Institute on Aging's residential Care Pilot Program, which is focused on transitioning individuals from custodial long-term care settings, back into community residential housing with related coordinated care supports.

SESSION DETAILS (CONTINUED)



DR. AMY SCRIBNER, PhD, is the San Mateo County Regional Director of Community Living Services at the Institute on Aging (IOA). She received her BA in Psychology from Loyola University, her PhD from Palo Alto University and is a licensed psychologist. Prior to joining IOA, Amy was a behavioral health consultant in SNFs and later moved into managing operations of a network of consulting behavioral health providers in SNFs. Amy has been in an administrative role with the IOA since 2012, and in 2014 shifted into her current role as Regional Director in San Mateo County. She has been instrumental in getting the Community Care Settings Pilot Program (CCSP) operational and functional. Amy serves as the primary liaison between Health Plan of San Mateo and IOA.



ERIN WESTPHAL currently serves as program officer for The SCAN Foundation. Ms. Westphal's work focuses on building the business case for person-centered care models and integrating the care and financing for medical and social services.

Prior to joining the Foundation, Ms. Westphal was the special project coordinator for the City of Los Angeles Department of Aging. In this role, she developed community based programs for seniors and caregivers in the City of Los Angeles. Additionally, Ms. Westphal has served as director of research for the Beverly Foundation and project coordinator for the Orange County Elder Abuse Forensic Center.

Ms. Westphal holds a Masters of Science in Gerontology degree from the University of Southern California Davis School of Gerontology and a Bachelors degree in psychology from San Diego State University.

2:15pm – 3:30pm | Breakout Session #2 | Gold Room, Fourth Floor

INITIATIVES TO IMPROVE ACCESS TO QUALITY PALLIATIVE CARE

Quality palliative care programs are a critical part of the continuum of care to address the quality of life for individuals with serious illness. Access to palliative care programs varies considerably in California. The expert panel will describe local and statewide efforts to improve access to quality palliative care programs.

MODERATOR: **Kate O'Malley**, Senior Program Officer, California HealthCare Foundation

PRESENTERS:

- **J. Redwing Keyssar**, Author, Director, Palliative Care and Nursing Programs, Jewish Family and Children's Services of San Francisco Bay Area
- **Leah Morris, RN, MPH, NP**, Director of Policy & Payor Relations, Coalition for Compassionate Care
- **Dr. Christine Ritchie, MD**, Professor, UCSF School of Medicine



KATE O'MALLEY is a senior program officer with CHCF's High-Value Care team. As such she manages projects focused on improving care and lowering system costs for high-cost populations, especially toward the end of life.

Prior to joining CHCF, she served as a senior project manager for nursing home quality improvement and as collaborative director for educational development with Lumetra in San Francisco. Earlier experience includes 20 years with On Lok Senior Health Services in San Francisco, in clinical and management roles, including the national replication of the On Lok model. As a geriatric nurse practitioner, O'Malley provided care to frail elders in community settings and also served as a

Peace Corps volunteer in Kenya.

O'Malley received a degree in nursing from the University of Rhode Island, a master's degree in health education from San Francisco State University, and certification as a geriatric nurse practitioner from the University of California, San Francisco. She is also a Certified Hospice and Palliative Nurse (CHPN®).

SESSION DETAILS (CONTINUED)



JUDITH REDWING KEYSSAR, RN, BA, AUTHOR, is the Director of the Palliative Care Program at Seniors at Home, a division of Jewish Family and Children's Services of the San Francisco Bay Area. As a "midwife to the dying" she draws upon 25+ years of nursing experience in oncology, critical care and hospice, working in hospitals, non-profits and as a private consultant. She is one of the founders of the California State University Institute of Palliative Care. Ms. Keyssar has taught courses in all aspects of care of the dying, has published numerous articles and blogs, and presents nationally on Palliative and End of Life issues. Her book, *Last Acts of Kindness; Lessons for the Living from the Bedsides of the Dying*, won a 2011 American Journal of Nursing Book of the Year Award. She is the 2015 recipient of the Coalition for Compassionate Care of California's Individual Compassionate Care Leadership Award.



LEAH MORRIS, RN, MPH, NP With an interest in health policy and population health, Leah Morris' career has spanned patient care, legislative advocacy, and national health care delivery.

Leah has over thirty years of experience in health care. She started her career as a staff nurse and later moved into executive level positions at a national Preferred Provider Organization, two Health Maintenance Organizations, and at the regional medical group level. She developed and implemented managed care programs for private commercial and publically financed (Medi-Cal and Healthy Families) health insurance programs. Most recently, Leah was part of the start-up team to bring Covered California to market, now insuring 1.3 million Californians under the federal Affordable Care Act.

After completing her nurse practitioner program, Leah now provides medical management for patients at Yolo Hospice of Davis, and is currently involved in the launch of their community-based, outpatient palliative care program for Medi-Cal patients: Yolo CARE.

Leah is a registered nurse and holds a Master of Public Health degree and a Master of Science and Certificate as a Family Nurse Practitioner.



DR. CHRISTINE RITCHIE, MD, MSPH, FACP, FAAHPM, is the Harris Fishbon Distinguished Professor in Clinical Translational Research and Aging. She is a board certified geriatrician and palliative care physician with long-standing experience in clinical care delivery and advanced illness research. Dr. Ritchie has overseen the development of a number of comprehensive clinical programs for seriously ill older adults, most recently at the University of Alabama at Birmingham (UAB) where she directed the Center for Palliative and Supportive Care. At UCSF, Dr. Ritchie serves as medical director of Clinical Programs in the Office of Population Health. She is also working with other colleagues to facilitate the growth of clinical programs and research that focus on quality of life and health care delivery models for those with chronic serious illness and multimorbidity. She directs Tidswell at UCSF (tidswellucsf.org) and co-leads a national Network of Home-based primary care and palliative care practices and is working to develop quality measures that are appropriate to the homebound population. She is President of the American Academy of Hospice and Palliative Medicine.

3:45pm – 4:30pm | Grand Ballroom, First Floor

A DIALOGUE WITH LOCAL LEADERS: HOW DO YOU CREATE MEANINGFUL CHANGE?

In this closing plenary session, attendees will hear from local Bay Area leaders about how they have been able to enact meaningful change in the Bay Area around issues that impact the aging and health care community, such as health plan care coordination, affordable housing and implementing county-wide policy initiatives. How can we enact meaningful change to preserve and protect the safety-net for seniors in the Bay Area? This session will feature speakers from different Bay Area regions and include a facilitated discussion on how we, as a Coalition, can support our local leaders in their efforts and translate the momentum from today's forum into meaningful change.

MODERATOR: **Robert Edmondson**, CEO, On Lok and Co-Chair of the Bay Area Senior Health Policy Forum

PRESENTERS:

- **Supervisor Wilma Chan**, Alameda County Board of Supervisors
- **Elizabeth Gibboney**, CEO, Partnership HealthPlan of California
- **James Ramoni**, Director, Department of Aging and Adult Services, Santa Clara County

SESSION DETAILS (CONTINUED)

ROBERT EDMONDSON (please see Mr. Edmondson's bio on page 3)



WILMA CHAN has been a strong advocate for children and families for over 35 years. As Assemblywoman, Wilma Chan served as the first woman Majority Leader of the California State Assembly. She represented Oakland, Alameda and Piedmont in the State Assembly from 2000-2006. She authored many groundbreaking bills including making California the first state to ban toxic flame retardants and implement a no-lead standard in drinking water pipes and fixtures. Ms. Chan authored historic legislation to end the practice of hospitals overcharging uninsured and underinsured patients and to cover California's 800,000 uninsured children. She won approval of \$100 million to expand State Preschool and fought successfully to maintain the state's Master Plan for college student access. It was her bill that in 2010 blew the whistle on Anthem Blue Cross when they tried to implement a 33% rate increase in California. The national attention to this issue helped propel national healthcare reform to victory.

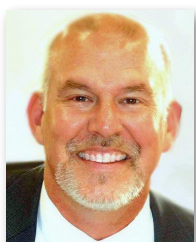
Prior to her election to the Assembly, Ms. Chan was elected twice as the first Asian American to serve on the Alameda County Board of Supervisors after completing a term on the Oakland Board of Education. As a Supervisor, Ms. Chan wrote the strategic plan to keep the County Medical Center (also known as Alameda Health System) open and formed the Alameda County First Five Commission (Every Child Counts). She implemented a citizenship program with the passage of welfare reform and formed the Alameda and San Leandro Youth collaboratives.

She most recently served as Vice President for Policy at Children Now, a national children's advocacy organization located in Oakland before returning to the Alameda County Board of Supervisors in 2010, where she currently serves as Vice President of the Board. Her current projects include the implementation of the Affordable Care Act, launching a countywide New War on Poverty, All-In Alameda County, and implementing the Human Impact Budget. She is also a leader in elder care, environmental, and labor issues.

Ms. Chan holds a BA in history from Wellesley College and an MA in education policy and administration from Stanford University. She has two grown children and one grandchild.



ELIZABETH GIBBONEY became the Chief Executive Officer of Partnership HealthPlan of California on July 1, 2015. With over 20 years of health care experience including eight years as Deputy Chief Executive Officer/Chief Operating Officer at Partnership HealthPlan of California, Liz has a wealth of knowledge in leading and implementing effective health care in Northern California. Liz was integral in PHC's expansions from serving one county in 1994 (Solano County) to the 14 served by PHC today. Liz is responsible for development and general management of our 530,000 member health plan, with an estimated annual revenue of \$2.3 billion.

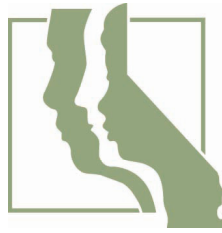


JAMES RAMONI's entire professional career has been in the Santa Clara County Social Services Agency dating back to 1990 as an entry level social worker in child welfare. Throughout the 1990's Jim devoted his work to children and families in crisis and supervised social work staff in innovative programs including the Agency's multicultural family resource centers and led the department in the family conferencing initiative providing families a voice in child welfare decision making. In 1999, Jim moved to the newly created Department of Aging and Adult Services serving as the manager of the Senior Nutrition Program (SNP) as well as In-Home Supportive Services Program (IHSS). Mr. Ramoni was appointed Director of the Department of Aging and Adult Services in 2013 and is responsible for Adult Protective Services (APS), Senior Nutrition Program (SNP), In-Home Supportive Services (IHSS), and the Public Administrator/Guardian Conservator (PAGC) Office as well as the County initiative the Seniors' Agenda.

Jim possesses a Master of Social Welfare from the University of California, Berkeley, a Bachelor of Arts in Molecular Biology and Psychology from San Jose State University and is a Licensed Clinical Social Worker.

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The Bay Area Senior Health Policy Coalition is part of The SCAN Foundation's Community of Constituents initiative, building a statewide movement to transform the system of care so that all Californians can age with dignity, choice and independence.



For electronic copies of the speakers' presentations, please visit the Senior Health Policy Forum website: www.shpf.elders.org

We will email copies of the outcomes of this forum to all attendees who have provided email addresses. Copies will also be posted on this website by early 2016.