



BAY AREA

SENIOR HEALTH POLICY FORUM

FEBRUARY 20, 2014 | SOUTH SAN FRANCISCO CONFERENCE CENTER, SOUTH SAN FRANCISCO

PROCEEDINGS

PRESENTED BY

CENTER FOR ELDERS' INDEPENDENCE
ON LOK LIFEWAYS

SPONSORED BY

THE CALIFORNIA HEALTHCARE FOUNDATION
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Bay Area Senior Health Policy Forum Mission

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

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3RD BAY AREA SENIOR HEALTH POLICY FORUM

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A heartfelt thank you is due to Forum emcee Cheryl Phillips, keynote speaker Susan Reinhard, and the exceptional morning plenary speakers: Honorable Bill Harrison, Mayor of the City of Fremont; Stephen Johnston, Co-Founder of Aging2.0; Joshua Simon, Executive Director of East Bay Asian Local Development Corporation; and Ed Ortiz, Director of Provider Network Development & Services for the Health Plan of San Mateo.

We are also indebted to our inspirational afternoon workshop speakers who generously shared their time and expertise: 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 Healthy Aging, The Health Trust; Dustin Harper, Vice President of Community Living Services, Institute on Aging; Val Agostino, Vice President, San Francisco, Mercy Housing; Kevin Gerber, CEO, Episcopal Senior Communities; Chris Hess, Director of Resident Services, Satellite Affordable Housing Associates; William F. Pickel, Executive Director, West Bay Housing Corporation; Karen Grimsich, Aging and Family Services Administrator, City of Fremont; Corinne Jan, CEO, Family Bridges; Debbie Toth, CEO, Rehabilitation Services of Northern California; Carrie Wong, San Francisco Department of Aging and Adult Services; Grace Li, COO, On Lok Lifeways; Joanne Handy, President and CEO, LeadingAge California; David Lindeman, Director, Center for Technology and Aging; and Joe Gerardi, Senior Vice President of IT & CIO, ABHOW.

The success of the forum is directly attributable to the following indomitable members of the forum planning group, which we had the privilege of chairing:

- **The Health Trust:** Lori Andersen (www.healthtrust.org)
- **Center for Elders' Independence:** Alberto Ortega Hinojosa, Dianna Garrett, Angelin Barrios (www.cei.elders.org)
- **LeadingAge California:** Joanne Handy, Jan Guiliano (www.aging.org)
- **San Francisco Department of Aging and Adult Services:** Anne Hinton (www.sfgov.org/daas)
- **On Lok Lifeways:** Eileen Kunz, Jenny O'Toole, Katherine Kelly (www.onlok.org)
- **Senior Services Coalition of Alameda County:** Wendy Peterson (www.seniorservicescoalition.org)

- **City of Fremont Aging and Family Services:** Karen Grimsich (www.fremont.gov/index.aspx?NID=217)
- **San Mateo County Aging and Adult Services:** Lisa Mancini (www.smchealth.org/aas)

Each of the following individuals contributed mightily to the development and presentation of the forum. Thanks must also go to the following individuals who managed many behind-the-scenes details and successes:

- **Center for Elders' Independence:** Lenore McDonald, Marilyn Bryan, Theresa Galano, and David Caggiano
- **LeadingAge California:** Margaret Morneau and Felicia Price

Last, a sincere thank goes to the forum attendees who, on behalf of improving the safety net for Bay Area seniors, generously shared their passion, ideas, and commitment to action. Thank you!

Linda Trowbridge, CEO
Center for Elders' Independence

Bob Edmondson, CEO
On Lok Lifeways

OPENING PLENARY SUMMARY

Speakers:

Linda Trowbridge, CEO, Center for Elders' Independence

Bob Edmondson, CEO, On Lok Lifeways

Dr. Cheryl Phillips, Senior Vice-President, Public Policy and Advocacy, LeadingAge

Susan Reinhard, Senior Vice President, AARP, and Director, AARP Public Policy Institute

Setting The Stage – Highlights from Dr. Cheryl Phillips

Two-thirds of all the people in human history who have reached age 65 are alive right now. The way seniors want services, and the setting in which services are provided, are changing. We need to have both finance reform and delivery reform in order to impact long term services in a meaningful way. Collaboration is key, and having stand-alone programs or facilities is no longer sustainable. The focus is shifting to integrate services and to provide new models of payment. The Affordable Care Act provided many new delivery systems, but all of the focus has been on the Exchanges. The CMS Innovation Center is supporting new models of care (<http://innovation.cms.gov>). We need to work together as a community and not work in silos. Substantive change will come in the form of how we provide services to people at home, and we need to provide affordable housing for seniors. Existing programs are moving “out of the box” and learning to collaborate in new ways.

Keynote Speaker – Highlights from Susan Reinhard

AARP defines a livable community as one that is safe and secure, provides affordable and appropriate housing, supports community services and provides mobility options. Based on AARP's 2012 Individual Preference Survey, most adults age 50+ want to age in their homes and communities. AARP has designated 22 “age friendly communities” based on the World Health Organization's (WHO) Global Network of Age-Friendly Cities. AARP is also developing a Livability Index to calculate the livability scores for communities and improve the quality of life for community residents. One area of concern is that the ratio of caregivers has significantly declined, and is continuing to decline. California is ranked 30 nationwide in providing support for family caregivers. The AARP Public Policy Institute and United Hospital Fund collaborated on the first in-depth national survey of family caregivers to gather the characteristics of caregivers and recipients, tasks performed and what areas caregivers would like more training in, such as wound care.

MORNING PLENARY

Speakers:

Bill Harrison, Mayor, City of Fremont

Stephen Johnston, Co-Founder, Aging 2.0

Joshua Simon, Executive Director, EBALDC

Ed Ortiz, Director of Provider Network Development & Services, Health Plan of San Mateo

Moderated By: **Dr. Cheryl Phillips**, LeadingAge

Highlights from the Panel:

Mayor Harrison discussed the partnerships they've developed in Fremont to engage seniors. The City of Fremont is the fourth largest city in the Bay Area and is doing many innovative things around the issue of aging. Twelve percent of its residents are over age 60, and fifty seven percent speak a language other than English at home. In response to its diverse aging population, the City created "Pathways to Positive Aging" to find out what seniors wanted in an aging community and to implement these changes city-wide. The City also developed a "Community Ambassador Program for Seniors" to connect seniors to City services and activities in ways that are linguistically and culturally appropriate.

Stephen Johnston discussed how local technology companies are linking with aging projects. New challenges have arisen given the unprecedented demographic changes in the aging community. There are many local initiatives in the Bay Area that are focused on "aging in community" in the areas of dementia, transportation, transitions of care, supporting caregivers and enabling transportation.

Joshua Simon's presentation reviewed the "Eight Principles of Age-Friendly Cities" and explained that you can't just focus on stand-alone housing – it needs to be co-located with other services. The Principles include transportation, housing, social participation, respect and social inclusion, civic participation, communication, and outdoor space.

Ed Ortiz discussed the importance of connecting health care to community social services, and how this is happening more frequently as new programs are emerging. The Coordinated Care Initiative, scheduled to begin in April in San Mateo County, will provide a platform for health care services and social services to be combined under one plan (the Health Plan of San Mateo) in order to better coordinate care for Dual Eligibles.

AFTERNOON BREAKOUT SESSIONS

Advocacy Perspectives: Voices from Local Advocates & Legislative Staff

Description:

California's over-65 population is on track to more than double in the next two decades, and the dynamic policy and budgeting landscape of health care reform is dramatically impacting the way that health and support services are funded and delivered. What are the most promising legislative and advocacy opportunities to strengthen the senior safety net?

Speakers:

Jessica Bartholow, Legislative Advocate for the Western Center on Law and Poverty

Elisabeth Jewel, Partner at AJE (Aroner, Jewel, & Ellis)

Mark Chekal-Bain, District Director, Assemblymember Nancy Skinner (D-15)

Lori Andersen, Director of Healthy Aging, The Health Trust

Moderated By: **Dion Aroner**, former Assemblymember, State of California, and current lobbyist with AJE Partners

Highlights from this Session:

Elisabeth Jewel is a Partner at AJE Partners, a firm specializing in “government and community affairs for public and non-profit agencies, associations, and private sector clients.” Ms. Jewel discussed her work as a grass-roots advocacy consultant and shared key points to make your advocacy goal a success. Ms. Jewel encouraged organizations to meet with legislators and staff early on to familiarize them with your organization’s mission and purpose. Ms. Jewel also encouraged organizations to create coalitions and mutually beneficial partnerships, as legislators pay close attention to the number of people supporting an idea.

Mark Chekal-Bain is the District Director for Assemblymember Nancy Skinner. He discussed the role of legislative staff – specifically, what gets heard and what does not. The following information that is crucial to getting legislators to pay attention to an issue:

- Your knowledge of the legislator – pay attention to the committees they sit on, as that is a good indicator of what is important to the legislator.
- Is it an issue for the district? Legislators rarely pay attention to matters that have no place in their district unless the issue is specific to a committee s/he chairs.
- Coalition building is crucial – strength in numbers.

Jessica Bartholow is a legislative advocate for the Western Center on Law and Poverty, an organization dedicated to “Fight(ing) for justice and system-wide change to secure housing, healthcare, and a strong safety net for low-income Californians.” Ms. Bartholow provided examples of how to successfully influence policy, and had the following recommendations for being an effective advocate for your particular issue:

- Know the legislative calendar – it is critical to know what you can influence and when is the appropriate time to do so.
- Engage with committee staff on your issue.
- Have a “lobby day.”
- Invite your legislator to a site visit.
- Try to engage with media on your issue (social, print, TV, etc.).
- Pay attention to the language you use – i.e., do not say “restore”, instead say “invest.”

Lori Andersen is the Director of Healthy Aging at The Health Trust, whose mission is to “lead the Silicon Valley community to advance wellness.” Ms. Anderson spoke about how you can create and sustain effective coalitions and campaigns for advocacy to advance common goals.

Proven strategies for The Health Trust include:

- Reaching out so that you have a diverse membership;
- Listening and involving the membership in policy decisions;
- Offering solutions & be willing to compromise;
- Knowing what other organizations or advocates are asking for;
- Working towards an achievable goal, and letting the coalition work on that goal.

AFTERNOON BREAKOUT SESSIONS (CONT.)

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

Description:

With health care reform changes on the horizon, there is already so much innovation happening in the Bay Area health care community. This workshop featured presentations from local organizations on new programs they are implementing to improve local health care coordination, tips on how to develop relationships with provider groups and other organizations, and challenges organizations may encounter when implementing new programs.

Speakers:

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

Corinne Jan, CEO, Family Bridges

Debbie Toth, CEO, Rehabilitation Services of Northern California

Grace Li, Chief Operating Officer, On Lok Lifeways

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

Carrie Wong discussed the San Francisco Community Based Care Transitions Program (CCTP) which was launched in 2011 and focuses on assisting older adults and people with disabilities to transition from the hospital to their home to prevent unnecessary hospital readmissions. As background, nearly 2.6 million seniors discharged from U.S. hospitals every year are readmitted within 30 days. This costs over \$26 billion annually. The CCTP tests new models for improving care transitions from the hospital to other settings for high-risk Medicare beneficiaries. To date, 1,346 clients have been referred to the program, 89% have been transitioned to home and only 10% were readmitted to the hospital.

Corinne Jan discussed the Community Based Health Home (CBHH). Family Bridges, Inc., is one of six organizations in California that were selected as a CBHH, which includes a “nurse navigator” who connects elderly Duals in CBAS programs to services and supports outside of the CBAS Center. This two-year pilot program will end in 2015, and at that time, Family Bridges anticipates that they will be able to offer CBHH services to health plans as a service option for high-risk members.

Debbie Toth discussed their pilot project focused on connecting Medi-Cal only patients who are high utilizers of the ER and Skilled Nursing Facilities (SNF) to connect them with services and break the cycle of readmissions. They have developed a relationship with the Contra Costa Health Plan and have developed a process by which to refer high ER or SNF utilizers to do an assessment as soon as they are discharged so they are connected to the Adult Day Health Care program.

Grace Li reviewed how On Lok is finding innovative ways to expand its PACE programs in Santa Clara County through establishing Alternative Care Settings with existing providers across the county. Alternative Care Settings allow PACE participants to receive PACE services in other settings. Community physician waivers have also been key in order to broaden the physician network to serve a wider population of frail seniors. Such arrangements allow PACE programs flexibility in meeting the needs of their participants.

AFTERNOON BREAKOUT SESSIONS (CONT.)

Leveraging Technology

Description:

Technology is ubiquitous in today's world. Today's panelists share their perspectives on the following questions: What is the connection between aging and technology, between entrepreneurs and technological solutions that support wellness? How can these innovations be harnessed to allow seniors and people with disabilities "age in place"? What, if any, policy changes need to take place in the future to allow for technological innovations?

Speakers:

Stephen Johnston, Aging 2.0, Co-Founder

Dr. David Lindeman, PhD, Director, Center for Technology & Aging

Joe Gerardi, American Baptist Homes of the West (ABHOW), Senior Vice President of IT & CIO

Moderated By: **Joanne Handy**, President and CEO, Leading Age, California

Stephen Johnston spoke about his work with Aging 2.0®, "A global organization on a mission to accelerate innovation to improve the lives of older adults around the world." Their mission is to educate and support innovators and entrepreneurs who are working to address the needs of older adults through technological innovations. Among the needs that can be met by technology are:

- Remote Monitoring – Predicting and Preventing Falls and Other Health Issues
- Intergenerational Communication as a Means to Addressing Isolation and Depression
- Smart Phone Applications that Encourage Physical Activity

David Lindeman spoke of his work through Center for Technology & Aging (CTA), whose mission is to accelerate the diffusion of proven technology to improve the health and well-being of older adults. CTA provides one year grants to companies whose products or services increase operational efficiencies while simultaneously improving health outcomes. David also spoke about his work with Center for Information Technology Research in the Interest of Society (CITRIS), which, "Creates information technology solutions for many of our most pressing social, environmental, and health care problems." On the horizon for future technologies are remote laboratories, smart body patches, and other assistive technologies that enable aging in place without heavy reliance on a family caregiver.

Joe Gerardi is the Senior Vice President of Information Technology and Chief Information Officer for American Baptist Homes of the West (ABHOW), an organization dedicated to enhancing the “independence, well-being, and security of older people through the provision of housing, health care, and supportive services.” Mr. Gerardi spoke about how ABHOW has integrated technology into their facilities to achieve their goals. Some examples include providing wireless internet access for all residents, installing personal emergency response technology for residents, and providing ankle bands that monitor residents who are known wanderers. Future projects include introducing a tremor reducing spoon, providing enhanced passive monitoring of residents, and introducing programs that address medication management and chronic disease management.