



The
**John A. Hartford
Foundation**

2022
ANNUAL
REPORT



**That's
Age-Friendly!**

We can intentionally make care, and
all aspects of society, age-friendly



The
John A. Hartford
Foundation

Dedicated to improving the care of older adults

We invest in aging experts and practice innovations that transform how the care of older adults is delivered across three priority areas: Age-Friendly Health Systems, Family Caregiving and Serious Illness & End of Life.

www.johnahartford.org

The John A. Hartford Foundation
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A Message From Our Leadership

That's Age-Friendly!

Our close collaboration with grantees and partners made 2022 a watershed year for The John A. Hartford Foundation, marked by intention and tenacity leading to large-scale improvements in the care of older adults. We supported the development and release of the most comprehensive recommendations to improve nursing home care since the 1980s, a first-ever national strategy to support family caregivers and a new paradigm for talking to the public about end-of-life and serious illness care.

You'll often hear our Trustees and staff pointing to positive shifts resulting from our efforts, noting: ***"That's age-friendly!"*** It's why we chose this phrase as our theme for the 2022 Annual Report—it encapsulates what we do and what we stand for.

That's age-friendly! serves as a reminder that we can intentionally make care and all aspects of society age-friendly, from our health systems, to public health, to community-based services. Age-friendly care extends to supporting family caregivers of older adults and centers on what matters to older people and their families, which is especially critical during serious illness and at the end of life.

Age-friendly care is equitable care. The Age-Friendly Health Systems initiative provides guidance on how to address inequities. We are supporting new generations of leaders of color through the American Society on Aging's ASA RISE program to shape inclusive aging policies and programs at the local, state and federal levels. We continue core support grants to national advocacy organizations that are tenacious and undaunted in the pursuit of health equity for marginalized older adults.

Our 2022 grants intentionally linked our priority areas—such as bringing the 4Ms of age-friendly health care to family caregivers and integrating serious illness messaging in Age-Friendly Health Systems sites. We saw connections continue to strengthen between our programs that promote age-friendly care in specific settings, such as emergency departments, surgical units, nursing homes and residential homes. Our grants demonstrate a range of dynamic approaches that effectively promote age-friendly care through new tools and resources. Many of our grants are fueling federal and state policy change.

While there were many highlights from 2022, three particularly demonstrate the power of intention and tenacity in making care for older adults age-friendly:

The National Academies nursing home report and creating the Moving Forward Nursing Home Quality Coalition

The bold *National Imperative to Improve Nursing Home Quality* report released in April 2022 represents a new dawn for nursing homes. The report's comprehensive set of feasible yet transformational recommendations in critical areas such as workforce and financing are backed by evidence and experts, including residents and family caregivers. To ensure the recommendations move to action, we funded the Moving Forward Coalition. The coalition launched with 100 participants and today engages 800 members including advocates, nursing home staff, operators, researchers, residents and family members. Committees are prioritizing actions that will be taken in the near and longer term to radically improve nursing home care throughout the country.

RAISE National Strategy to Support Family Caregivers

A true cross-sector partnership, the RAISE National Strategy represents decades of work to elevate the needs of family caregivers, and by extension the direct care workers with whom they work so closely. The strategy outlines actions that 15 federal agencies will

take, and provides clear and concrete steps that states, health systems, employers, non-profits and philanthropy should enact to meet the needs of caregivers as the critical lifelines they are. We continue our close partnership with the Administration for Community Living and the National Academy for State Health Policy to implement this whole-of-society strategy.

Increasing public understanding of serious illness and end-of-life care

Improving serious illness and end-of-life care is a hallmark issue for us, especially as it relates to increasing conversations about ‘what matters’ to older adults. This is why we’re so proud of the new Serious Illness Messaging Toolkit, which uses consumer-informed messaging to help clinicians and others engage in understandable discussions about advanced care planning, palliative care and hospice. Supported by a dedicated coalition of 12 national organizations, this easy-to-use toolkit is a gamechanger that will help the field engage the public in new and more effective ways.

As we look back on 2022 and mark three somber years since the start of a horrific pandemic, we are fortunate to have emerged as an even more tenacious and nimble foundation. We are driven by a fervent desire to achieve our mission, made better through strategic partnerships and empowered by our forward-thinking Trustees, whose oversight encourages and strengthens our impact.

We recognize the considerable contributions and celebrate the retirement of board member Audrey McNiff in 2022 and graciously thank Peggy Wolff as she completed her term as board Chair. In June of last year, we presented our dear colleague Marie Bernard, MD, chief officer for scientific workforce diversity at the National Institutes of Health, with The John A. Hartford Foundation Trustees Award for her steadfast dedication to improving the lives of older adults through research, education and clinical practice improvement.

Thank you for another strong year focused on doing what’s needed to improve the lives and care of older adults, no matter how long it takes or what shape it forms.

That’s our intention, and *that’s age-friendly!*



Terry Fulmer, PhD, RN, FAAN
President



John R. Mach, Jr., MD
Chair





Prioritizing What Matters: **Age-Friendly Health Systems**

Age-friendly care must be reliably delivered wherever and whenever older adults need it, from their homes to long-term care facilities to the emergency department and beyond. Collaboration between health systems, community-based services and public health create an ecosystem where *everyone* can get age-friendly care.

By promoting standards, creating tools and offering training to clinicians and service providers, we are expanding age-friendly care based on what works and what matters to older adults and their caregivers. *That's age-friendly!*



Age-Friendly Health Systems Featured Milestones

more milestones starting on page 36 ►

JAHF and **Institute for Healthcare Improvement** publish a book, *Age-Friendly Health Systems: A Guide to Using the 4Ms While Caring for Older Adults*.

USAgings' Business Institute debuts an evidence bank to help community-based organizations show their value as contracting partners to health care entities.

Trust for America's Health launches an updated Age-Friendly Public Health Systems Recognition Program.

The **National Academies of Sciences, Engineering, and Medicine** releases the first comprehensive report on nursing home quality in 35 years.

National Collaboratory to Address Elder Mistreatment develops an emergency department toolkit to improve screening for elder mistreatment.

Moving Forward Nursing Home Quality Coalition forms to advance recommendations from the National Academies report, *The National Imperative to Improve Nursing Home Quality*.



Supporting the Backbone of Health Care: **Family Caregiving**

Family caregivers play a critical role in caring for millions of older adults, and without support, they *and* those they care for can be at risk of harm. The needs of caregivers must be addressed for care to be age-friendly.

We recognize the importance of caring for those who care, and to do so, we work across diverse sectors to change policy and support family caregivers with resources and assistance. *That's age-friendly!*



Family Caregiving

Featured Milestones

more milestones starting on page 36 ►

Diverse Elders Coalition

offers free training for health care, social service and aging professionals who want to better serve diverse family caregivers of older adults.

Coalition for Care Partners

highlights the developing, testing and scaling of consumer-oriented technologies to engage care partners.

Center for Health Care Strategies

tool guides states interested in pursuing cross-sector partnerships to strengthen services for family caregivers.

U.S. Department of Health and Human Services

publishes the 2022 National Strategy to Support Family Caregivers.

JAHF *Age-Friendly Insights*

poll finds broad, overwhelming support for policies to help family caregivers.

RUSH University Medical Center

shares learnings from their Age-Friendly Health Systems caregiver intervention program pilot.



Helping People Live Well at Every Stage: **Serious Illness and End of Life**

There is no time age-friendly care is more important than during serious illness and at the end of life. But too often, the care we receive is not aligned with our goals, values and preferences.

With our partners, we help people understand and discuss palliative and hospice care. We help clinicians communicate its value. We help transform policies and practice so that care reflects what matters to you—always. *That's age-friendly!*



Serious Illness and End of Life Featured Milestones

more milestones starting on page 36 ▶

National Academy for State Health Policy launches a multimedia explainer to help policymakers educate the public about palliative care.

FAIR Health creates a dedicated webpage for older adults and caregivers with new shared decision-making tools.

Serious Illness and End-of-Life Funders Community celebrates five years of collaboration in partnership with **Grantmakers In Aging**.

Center to Advance Palliative Care convenes a national briefing on its research findings on access to palliative care for Black patients with serious illness.

The **Serious Illness Messaging Toolkit** launches with resources for public messaging about serious illness care.

Hospice and Palliative Nurses Association announces JAHF's Amy Berman as the HPNA Champion Award Winner.



Trustees & Staff

Board of Trustees

John R. Mach, Jr., *Chair*

Elizabeth A. Palmer, *Co-Vice Chair*

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** Retired June 2022*

Staff

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Melida Galvez, *Senior Accountant and Assistant Grants Manager*

Rutuma Gandhi, *Accounting Manager*

Julianne McLean, *Program Administrator / Travel Coordinator*

Jon Miller, *Grants Manager*

Jennifer Phillips, *Executive Assistant*

Nancy Wexler, *Program Officer*

Interns

**Eiman Ali, Teffin Benedict, Andrea Diep,
Sofia Espinosa, Jessica Huang, Abby Maglich,
Grace Morton, Rumaysa Sharif, Rebecca Slossberg**

as of December 2022





Grants

We funded a robust roster of 30 new grants totaling \$41,804,459 to improve the care of older adults. The Foundation made \$24,506,645 in payments to existing grants in 2022.



New Grants in 2022

30

\$41.8 M

First Quarter 2022

Gerontological Society of America **\$1,143,891**

*Establishing The National Center to Frame Aging:
Advancing a New Conversation about Aging in America*

Health Research and Educational Trust **\$2,293,409**

Spreading the Age-Friendly Health Systems Social Movement

USAging **\$2,880,522**

*Aging and Disability Business Institute, Phase III:
Advancing Equity and Excellence through Sustainable
Networks and Partnerships*

NORC at the University of Chicago **\$94,690**

Evaluation Design Plan for The Center for Discovery

Second Quarter 2022

AARP Foundation **\$100,000**

*Advancing Action: A Reimagined and Enhanced State
Scorecard on Long-Term Services and Supports for
Older Adults, People with Physical Disabilities,
and Family Caregivers*

Icahn School of Medicine at Mount Sinai **\$1,960,000**

*The Center to Advance Palliative Care: Achieving Sustainable
Change in the Care of Older Adults with Serious Illness*

Institute for Healthcare Improvement **\$1,388,406**

*Establishing an Age-Friendly Health Care Package
for State Master Plans for Aging*

LeadingAge	\$1,165,982
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Action to Improve Nursing Home Quality

National PACE Association	\$469,972
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PACE 200K: Building for Sustainable Growth and Quality

Project HOPE - The People-to-People Health Foundation / Health Affairs	\$905,800
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Publishing and Disseminating Lessons on Innovations in Health Care to Support Age-Friendly Health

Third Quarter 2022

ADvancing States	\$465,000
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Maximizing the Impact of American Rescue Plan Act Home and Community-Based Funding - State Support and Learning Project

National Academy for State Health Policy	\$924,816
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Building State Policies to Improve Care for People with Serious Illness

Henry J. Kaiser Family Foundation	\$302,001
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The 2022 - 2023 Older Adult Reporting Project

Institute for Healthcare Improvement	\$7,578,812
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Age-Friendly Health Systems Movement - Stage 3: Embedding, Deepening and Sustaining 4Ms Care in Health Care Systems

Research Foundation for Mental Hygiene	\$3,026,263
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The Health and Aging Policy Fellows Program: A Pipeline for Leaders in Aging Policy

RUSH University Medical Center	\$1,854,890
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*Ready, Willing and Able: Caring for Caregivers in
Age-Friendly Health Systems - Dissemination Phase*

University of Washington	\$2,900,000
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*Disseminating Evidence-Based Messaging about Palliative
& End-of-Life Care for Persons Living with Serious Illness*

Fourth Quarter 2022

American Academy of Home Care Medicine	\$361,199
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*Moving and Scaling Home-Based Primary Care,
Phase III: Quality, Training, Advocacy and Policy*

Center for Medicare Advocacy	\$300,000
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*General Operating Support: Advancing Equity
for Older Adults*

Community Catalyst	\$300,000
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*General Operating Support: Advancing Equity
for Older Adults*

Duke University	\$325,000
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*Moving and Scaling Home-Based Primary Care,
Phase III: Quality, Training, Advocacy and Policy*

Emergency Medicine Foundation	\$996,273
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*Geriatrics Emergency Department 4.0:
Accreditation, Dissemination, Sustainability and Evaluation*

Home Centered Care Institute	\$805,263
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*Moving and Scaling Home-Based Primary Care,
Phase III: Quality, Training, Advocacy and Policy*

Johns Hopkins University	\$1,398,130
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*Moving and Scaling Home-Based Primary Care,
Phase III: Quality, Training, Advocacy and Policy*

Justice in Aging	\$300,000
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*General Operating Support: Advancing Health Equity
for Older Adults*

National Alliance for Caregiving	\$985,851
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*The National Campaign for the RAISE National Strategy:
Action Toward Implementation*

National Rural Health Association	\$575,000
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National Rural Age-Friendly Initiative: Planning Grant

University of North Carolina at Chapel Hill	\$1,999,959
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*Geriatrics Emergency Department 4.0:
Accreditation, Dissemination, Sustainability and Evaluation*

Yale University	\$1,031,333
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*Geriatrics Emergency Department 4.0:
Accreditation, Dissemination, Sustainability and Evaluation*

Yale University	\$2,971,997
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*Patient Priorities Care Phase III:
Dissemination and Sustainability*

FUNDING GUIDELINES

The John A. Hartford Foundation makes grants by invitation only.

The Foundation normally makes grants to organizations in the United States which have tax-exempt status under Section 501(c)(3) of the Internal Revenue Code (and are not private foundations within the meaning of section 107(c)(1) of the code), and to state colleges and universities. The Foundation does not make grants to individuals.

All Active Grants

		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
AGING & HEALTH GRANTS					
AGE-FRIENDLY HEALTH SYSTEMS					
AARP Foundation <i>Advancing Action: A Reimagined and Enhanced State Scorecard on Long-Term Services and Supports for Older Adults, People with Physical Disabilities, and Family Caregivers</i> Susan Reinhard, PhD, RN	Washington, DC	-	100,000.00	100,000.00	-
ADvancing States, Inc. <i>Maximizing the Impact of American Rescue Plan Act Home and Community-Based Funding - State Support and Learning Project</i> Camille Dobson, MPA	Washington, DC	-	465,000.00	315,242.00	149,758.00
Age Friendly Foundation, Inc. dba Age-Friendly Institute* <i>Promoting an Age-Friendly Ecosystem: Harnessing Consumer Insights to Advance "Age Friendly" in Health Care and Across Settings</i> Tim Driver, MBA	Waltham, MA	500,000.00	-	500,000.00	-
American Academy of Home Care Medicine, Inc. <i>Moving and Scaling Home-Based Primary Care Phase II: Quality, Training and Advocacy</i> K. Eric DeJonge, MD	Baltimore, MD	58,250.00	-	58,250.00	-
American Academy of Home Care Medicine, Inc. <i>Moving and Scaling Home-Based Primary Care, Phase III: Quality, Training, Advocacy and Policy</i> K. Eric DeJonge, MD	Baltimore, MD	-	361,199.00	121,000.00	240,199.00
American College of Surgeons <i>Geriatric Surgery Verification (GSV) Phase II: Evaluation and Improvement</i> Clifford Ko, MD, MS, MSHS, FACS, FASCRS	Chicago, IL	1,366,321.00	-	-	1,366,321.00
American Geriatrics Society, Inc. <i>Geriatrics Workforce Enhancement Program (GWEP) Coordinating Center, Phase II</i> Nancy Lundebjerg, MPA	New York, NY	972,106.00	-	972,106.00	-
Case Western Reserve University <i>Age-Friendly Health Systems: Ambulatory Care Continuum Implementation</i> Mary Dolansky, PhD, RN, FAAN	Cleveland, OH	690,314.00	-	690,314.00	-

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
Center for Health Care Strategies, Inc. <i>Development of the Better Care Playbook, Phase VI</i> Lorie Martin	Hamilton, NJ	100,000.00	-	-	100,000.00
Convergence Center for Policy Resolution <i>Convergence Dialogue on Reimagining Care for Older Adults</i> Stuart M. Butler, PhD	Washington, DC	18,000.00	-	18,000.00	-
Duke University <i>Moving and Scaling Home-Based Primary Care, Phase III: Quality, Training, Advocacy and Policy</i> Robert Saunders, PhD	Durham, NC	-	325,000.00	106,093.00	218,907.00
Education Development Center, Inc. <i>National Collaboratory to Address Elder Mistreatment Phase III: Expanding the Impact of the Elder Mistreatment Emergency Department Toolkit</i> Rebecca Stoeckle	Waltham, MA	1,068,201.00	-	-	1,068,201.00
Emergency Medicine Foundation of the American College of Emergency Physicians Geriatrics Emergency Department 4.0: <i>Accreditation, Dissemination, Sustainability and Evaluation</i> Sandra Schneider, MD, FACEP	Irving, TX	-	996,273.00	394,689.00	601,584.00
Emergency Medicine Foundation of the American College of Emergency Physicians Geriatrics Emergency Department Accreditation: <i>Expansion Phase II</i> Sandra Schneider, MD, FACEP	Irving, TX	252,898.00	-	252,898.00	-
Health Careers Futures <i>Revisiting the Teaching Nursing Home</i> Nancy Zions, MBA	Pittsburgh, PA	302,936.00	-	302,936.00	-
Health Research and Educational Trust of the American Hospital Association <i>Spreading the Age-Friendly Health Systems Social Movement</i> Marie Cleary-Fishman, MS, MBA, BSN	Chicago, IL	-	2,293,409.00	809,218.00	1,484,191.00
Health Research and Educational Trust of the American Hospital Association <i>Next Generation Leaders Transformation Institute: 1) Developing Age-Friendly Health Systems Leadership; 2) Transforming HRET's HIIN Hospitals to Become More Age-Friendly</i> Marie Cleary-Fishman, MS, MBA, BSN	Chicago, IL	327,533.00	-	327,533.00	-

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
Home Centered Care Institute <i>Moving and Scaling Home-Based Primary Care, Phase II: Quality, Training and Advocacy</i> Melissa Singleton, MEd	Schaumburg, IL	151,250.00	-	151,250.00	-
Home Centered Care Institute <i>Moving and Scaling Home-Based Primary Care, Phase III: Quality, Training, Advocacy and Policy</i> Thomas Cornwell, MD	Schaumburg, IL	-	805,263.00	270,726.00	534,537.00
Icahn School of Medicine at Mount Sinai <i>Scaling and Dissemination of Hospital at Home in the Time of COVID-19 and Beyond</i> Albert Siu, MD, MSPH	New York, NY	1,024,994.00	-	1,024,994.00	-
Institute for Healthcare Improvement <i>Age-Friendly Health Systems Initiative, Phase II</i> Kedar Mate, MD	Boston, MA	2,554,697.00	-	2,124,422.00	430,275.00
Institute for Healthcare Improvement <i>Age-Friendly Health Systems Movement - Stage 3: Embedding, Deepening and Sustaining 4Ms Care in Health Care Systems</i> Kedar Mate, MD	Boston, MA	-	7,578,812.00	-	7,578,812.00
Institute for Healthcare Improvement <i>Establishing an Age-Friendly Health Care Package for State Master Plans for Aging</i> Kedar Mate, MD	Boston, MA	-	1,388,406.00	424,274.00	964,132.00
Johns Hopkins University <i>Moving and Scaling Home-Based Primary Care, Phase III: Quality, Training, Advocacy and Policy</i> Bruce Leff, MD	Baltimore, MD	-	1,398,130.00	440,531.00	957,599.00
LeadingAge, Inc. <i>Action to Improve Nursing Home Quality</i> Katie Smith Sloan, MA	Washington, DC	-	1,165,982.00	625,640.00	540,342.00
Massachusetts General Hospital <i>Moving and Scaling Home-Based Primary Care, Phase II: Quality, Training and Advocacy</i> Christine Ritchie, MD, MSPH	Boston, MA	195,992.00	-	195,992.00	-
National Academy of Sciences <i>Advancing Diagnostic Excellence: A Workshop Series</i> Sharyl Nass, PhD	Washington, DC	95,000.00	-	95,000.00	-
National Academy of Sciences <i>National Academy of Medicine Scholars in Diagnostic Excellence</i> Yumi Phillips, MA	Washington, DC	94,644.00	-	94,644.00	-

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
National Association of Area Agencies on Aging, Inc. now USAging <i>Aging and Disability Business Institute, Phase III: Advancing Equity and Excellence through Sustainable Networks and Partnerships</i> Marisa Scala-Foley, MGS	Washington, DC	-	2,880,522.00	957,317.00	1,923,205.00
National Committee for Quality Assurance <i>Supporting Age-Friendly Health Systems: Implementing and Disseminating Person-Driven Outcome Measures</i> Caroline Blaum, MD, MS	Washington, DC	833,293.00	-	532,050.00	301,243.00
National PACE Association <i>PACE 200K: Building for Sustainable Growth and Quality</i> Peter Fitzgerald, MSc	Alexandria, VA	-	469,972.00	192,318.00	277,654.00
National Rural Health Association <i>National Rural Age-Friendly Initiative: Planning Grant</i> Amy Elizondo, MPH	Leawood, KS	-	575,000.00	385,555.00	189,445.00
Research Foundation for Mental Hygiene, Inc. <i>Health and Aging Policy Fellows Program</i> Harold Pincus, MD	Menands, NY	602,807.00	-	568,348.00	34,459.00
Research Foundation for Mental Hygiene, Inc. <i>The Health and Aging Policy Fellows Program: A Pipeline for Leaders in Aging Policy</i> Harold Pincus, MD	Menands, NY	-	3,026,263.00	-	3,026,263.00
Society to Improve Diagnosis in Medicine <i>Diagnostic Excellence Small Grants Program</i> Gerard Castro, PhD, MPH, PMP	Alpharetta, MD	60,000.00	-	60,000.00	-
Society to Improve Diagnosis in Medicine <i>Fellowship in Diagnostic Excellence Program</i> Gerard Castro, PhD, MPH, PMP	Alpharetta, MD	50,000.00	-	50,000.00	-
Trust for America's Health <i>Expanding Age-Friendly Public Health Systems, Phase II</i> J. Nadine Gracia, MD, MSCE	Washington, DC	613,952.00	-	613,952.00	-
University of North Carolina at Chapel Hill <i>Geriatrics Emergency Department 4.0: Accreditation, Dissemination, Sustainability and Evaluation</i> Kevin Biese, MD, MAT	Chapel Hill, NC	-	1,999,959.00	655,772.00	1,344,187.00

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
University of North Carolina at Chapel Hill <i>Geriatrics Emergency Department Collaborative (GEDC) 3.0: Expanding Dissemination and Enhancing Evaluation</i> Kevin Biese, MD, MAT	Chapel Hill, NC	464,383.00	-	464,383.00	-
Yale University <i>Geriatrics Emergency Department 4.0: Accreditation, Dissemination, Sustainability and Evaluation</i> Ula Hwang, MD	New Haven, CT	-	1,031,333.00	-	1,031,333.00
Yale University <i>Geriatrics Emergency Department Collaborative (GEDC) 3.0: Expanding Dissemination and Enhancing Evaluation</i> Ula Hwang, MD	New Haven, CT	350,678.00	-	350,678.00	-
Yale University <i>Patient Priorities Care Phase III: Dissemination and Sustainability</i> Mary Tinetti, MD	New Haven, CT	-	2,971,997.00	990,963.00	1,981,034.00
Yale University <i>Patient Priorities Care: Dissemination and Scaling</i> Mary Tinetti, MD	New Haven, CT	750,124.00	-	750,124.00	-
TOTAL AGE-FRIENDLY HEALTH SYSTEMS		13,498,373.00	29,832,520.00	16,987,212.00	26,343,681.00
FAMILY CAREGIVING					
Benjamin Rose Institute on Aging <i>Best Practice Caregiving Phase III: Consumer Version</i> David Bass, PhD	Cleveland, OH	213,796.00	-	-	213,796.00
Beth Israel Deaconess Medical Center, Inc. <i>Engaging Family Caregivers through Shared Access to the Electronic Health Record</i> Catherine DesRoches, DrPH	Boston, MA	995,248.00	-	497,018.00	498,230.00
Center for Health Care Strategies, Inc. <i>Helping States Support Family Caregivers Caring for an Aging America, Phase II</i> Logan Kelly, MPH	Hamilton, NJ	179,928.00	-	179,928.00	-
Center for Health Policy Development dba National Academy for State Health Policy <i>The RAISE Act Family Caregiver Resource and Dissemination Center</i> Wendy Fox-Grage, MS, MPA	Washington, DC	155,437.00	-	155,437.00	-

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
Diverse Elders Coalition <i>Fiscal Sponsor: Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE)</i> <i>Strengthening Training and Advocacy Capacity to Support Diverse Family Caregivers</i> Lauren Pongan, MA	New York, NY	892,606.00	-	-	892,606.00
National Alliance for Caregiving <i>The National Campaign for the RAISE National Strategy: Action Toward Implementation</i> Michael Wittke, MPA	Washington, DC	-	985,851.00	459,154.00	526,697.00
Regents of the University of California, Los Angeles <i>UCLA Alzheimer's and Dementia Care Program: Creating a Sustainable Health Systems Model for National Dissemination</i> David Reuben, MD	Los Angeles, CA	1,394,990.00	-	-	1,394,990.00
RUSH University Medical Center <i>A Model for Caregiver Health and Wellness in Age-Friendly Health Systems, Planning Grant</i> Robyn Golden, LCSW	Chicago, IL	212,389.00	-	212,389.00	-
RUSH University Medical Center <i>Ready, Willing and Able: Caring for Caregivers in Age-Friendly Health Systems - Dissemination Phase</i> Robyn Golden, LCSW	Chicago, IL	-	1,854,890.00	666,838.00	1,188,052.00
TOTAL FAMILY CAREGIVING		4,044,394.00	2,840,741.00	2,170,764.00	4,714,371.00
SERIOUS ILLNESS & END OF LIFE					
Center for Health Policy Development dba National Academy for State Health Policy <i>Building State Policies to Improve Care for People with Serious Illness</i> Wendy Fox-Grage, MS, MPA	Washington, DC	-	924,816.00	310,289.00	614,527.00
FAIR Health <i>A National Initiative to Advance Cost Information in Shared Decision-Making for Serious Health Conditions</i> Ali Russo	New York, NY	67,238.00	-	67,238.00	-
Icahn School of Medicine at Mount Sinai <i>The Center to Advance Palliative Care (CAPC): Achieving Sustainable Change in the Care of Older Adults with Serious Illness</i> Brynn Bowman, MPA	New York, NY	-	1,960,000.00	839,765.00	1,120,235.00

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
University of Washington <i>Building Public Engagement and Access to Palliative & End-of-Life Care for Persons Living with Serious Illness</i> Anthony Back, MD	Seattle, WA	119,892.00	-	119,892.00	-
University of Washington <i>Disseminating Evidence-Based Messaging about Palliative & End-of-Life Care for Persons Living with Serious Illness</i> Anthony Back, MD	Seattle, WA	-	2,900,000.00	1,153,759.00	1,746,241.00
TOTAL SERIOUS ILLNESS & END OF LIFE		187,130.00	5,784,816.00	2,490,943.00	3,481,003.00
COMMUNICATIONS & SPECIAL PROJECTS					
American Society on Aging <i>Advancing Equity in Aging</i> Leanne Clark-Shirley, PhD	San Francisco, CA	216,381.00		-	216,381.00
Center for Medicare Advocacy, Inc. <i>General Operating Support: Advancing Equity for Older Adults</i> Judith Stein, JD	Willimantic, CT		300,000.00	100,000.00	200,000.00
Community Catalyst, Inc. <i>General Operating Support: Advancing Equity for Older Adults</i> Emily J. Stewart	Boston, MA		300,000.00	97,235.00	202,765.00
Gerontological Society of America** <i>Establishing The National Center to Frame Aging: Advancing a New Conversation about Aging in America</i> Patricia D'Antonio, BSPHarm, MS, MBA, BCGP	Washington, DC		1,143,891.00	253,275.00	890,616.00
Grantmakers In Aging <i>Core Support Renewal: Developing the Lens in Philanthropy and Beyond</i> John Feather, PhD	White Plains, NY	77,110.00		77,110.00	-
Henry J. Kaiser Family Foundation <i>Highlighting Aging & Health: The Older Adult Reporting Project</i> David Rousseau, MPH	San Francisco, CA	666,237.00		666,237.00	-
Henry J. Kaiser Family Foundation <i>The 2022 - 2023 Older Adult Reporting Project</i> David Rousseau, MPH	San Francisco, CA		302,001.00	302,001.00	-

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
Justice in Aging <i>General Operating Support: Advancing Health Equity for Older Adults</i> Amber Christ, JD	Oakland, CA		300,000.00	100,000.00	200,000.00
National Opinion Research Center <i>Evaluation Design Plan for The Center for Discovery (TCFD)</i> Dianne Munevar, MPP	Chicago, IL		94,690.00	94,690.00	-
Project HOPE - The People-to-People Health Foundation, Inc. <i>Publishing and Disseminating Lessons on Innovations in Health Care to Support Age-Friendly Health</i> Alan Weil, JD, MPP	Bethesda, MD		905,800.00	269,222.00	636,578.00
TOTAL COMMUNICATIONS & SPECIAL PROJECTS		959,728.00	3,346,382.00	1,959,770.00	2,346,340.00
TOTAL AGING & HEALTH GRANTS		18,689,625.00	41,804,459.00	23,608,689.00	36,885,395.00

PRESIDENT'S DISCRETIONARY GRANTS

PARTNERSHIP

Brandeis University <i>29th Princeton Conference Sponsorship</i> Stuart Altman, PhD	Waltham, MA		2,500.00	2,500.00	
Grantmakers In Aging <i>2022 Virtual Annual Meeting Support</i> Lindsay A. Goldman, LMSW	White Plains, NY		25,000.00	25,000.00	
Hebrew Home for the Aged at Riverdale Foundation <i>A Celebration of Hope - 105th Anniversary Gala</i> Neusa Delgado-Bowers	Riverdale, NY		14,000.00	14,000.00	
Hudson Headwaters Health Foundation <i>A Celebration of Hudson Headwaters</i> Jackie Villano	Queensbury, NY		1,000.00	1,000.00	
Institute for Healthcare Improvement <i>Berwick & Bisognano Scholarship Fund for Emerging Leaders</i> David Coletta	Boston, MA		20,000.00	20,000.00	
LeadingAge, Inc. <i>2022 Leadership Summit</i> Katie Smith Sloan, MA	Washington, DC		5,000.00	5,000.00	

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
Medicare Rights Center, Inc. <i>2022 Annual Awards Event</i> Frederic Riccardi	New York, NY		6,000.00	6,000.00	
National Academy of Sciences <i>Forum on Aging, Disability, and Independence</i> Tracy A. Lustig, DPM, MPH	Washington, DC		20,000.00	20,000.00	
National Academy of Sciences <i>Forum on Aging, Disability, and Independence</i> Tracy A. Lustig, DPM, MPH	Washington, DC		20,000.00	20,000.00	
National Academy of Sciences <i>Roundtable on Quality Care for People with Serious Illness</i> Laurene Graig, MS	Washington, DC		40,000.00	40,000.00	
National Quality Forum <i>2023 Conference - Hot Topic Session Sponsorship</i> Kathleen Giblin	Washington, DC		10,000.00	10,000.00	
New York Academy of Medicine <i>NYAM 2022 Annual Fund / ACCESS: Health Event</i> Lori Frank, PhD	New York, NY		5,000.00	5,000.00	
New York University <i>2022 NICHE (Nurses Improving Care for Healthsystem Elders) Conference</i> Mattia Gilmartin, PhD	New York, NY		25,000.00	25,000.00	
ROCS Foundation, Inc. <i>2022 Snowbird Health Summit</i> Danielle Sample	Sandy, UT		5,000.00	5,000.00	
ROCS Foundation, Inc. <i>2023 Health Summit at Sundance</i> Danielle Sample	Sandy, UT		10,000.00	10,000.00	
United Hospital Fund of New York <i>2022 United Hospital Fund Gala</i> Michelle Levy Branower	New York, NY		1,000.00	1,000.00	
TOTAL PARTNERSHIP			209,500.00	209,500.00	
PROGRAM DEVELOPMENT					
ADvancing States, Inc. <i>State Technical Assistance for ARPA HCBS Funding Implementation</i> Camille Dobson, MPA	Washington, DC		40,000.00	40,000.00	

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
Alosa Health, Inc. <i>Education Program on Aduhelm (aducanumab) for Health Care Professionals, Patients, and Families</i> Jerry Avorn, MD	Boston, MA		3,811.00	3,811.00	
Altarum Institute <i>Investigation of Indiana Area Agencies on Aging (AAAs) Incorporation into Medicare Advantage Dual Eligible Special Needs Plans (D-SNPs) Interdisciplinary Care Teams Using the 4Ms Framework</i> Sarah Barth, JD	Ann Arbor, MI		45,408.00	45,408.00	
American Society on Aging <i>Master Plan for Aging National Symposium 2023</i> Cindy Morris, MA	San Francisco, CA		20,000.00	20,000.00	
Council of Medical Specialty Societies <i>CMSS's Diagnostic Excellence Program, Supporting Subgrants to the American College of Surgeons and the American Society of Anesthesiology</i> Helen Burstin, MD, MPH, MACP	Chicago, IL		100,000.00	100,000.00	
Education Development Center, Inc. <i>Centers for Medicare & Medicaid Innovation (CMMI) Dementia Care Payment Reform Meeting</i> Rebecca Stoeckle	Waltham, MA		50,000.00	50,000.00	
Hilarity for Charity <i>Hilarity for Charity's Work on Humans of Dementia and/or to Combat Alzheimer's Stigma</i> Bonnie Wattles, MBA	Beverly Hills, CA		10,000.00	10,000.00	
National Medical Association, Inc. <i>Healthcare for Older Adult Populations in Communities of Color</i> Yolanda Lawson, MD, FACOG	Silver Spring, MD		7,500.00	7,500.00	
New York Academy of Medicine <i>Aging Workgroup and Aging-related Projects</i> Lori Frank, PhD	New York, NY		16,430.00	16,430.00	
YMCA of Greater New York <i>Center for Community Impact Initiatives including Socialization, Weight Loss, Strength Training, and Fall Prevention for Older Adults</i> Anthony Escobar	New York, NY		50,000.00	50,000.00	
TOTAL PROGRAM DEVELOPMENT			343,149.00	343,149.00	

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		BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
MEMBERSHIPS/OTHER GRANTS					
AcademyHealth <i>Membership Support</i> Angelica Rodriguez	Washington, DC		2,000.00	2,000.00	
American Telemedicine Association <i>Gold Level Membership Support</i> Ann Mond Johnson	Arlington, VA		25,000.00	25,000.00	
Grantmakers In Aging <i>Membership Support</i> Lindsay A. Goldman, LMSW	White Plains, NY		10,000.00	10,000.00	
Grantmakers In Health <i>Membership Support</i> Lauren LeRoy, PhD	Washington, DC		19,500.00	19,500.00	
Hispanics in Philanthropy <i>Membership Support</i> Rebecca English	Oakland, CA		5,000.00	5,000.00	
LeadingAge, Inc. <i>Membership Support</i> Diane Pappafotis	Washington, DC		1,100.00	1,100.00	
Long-Term Quality Alliance <i>LTQA Membership Dues</i> Mary Kaschak	Washington, DC		10,000.00	10,000.00	
Milken Institute <i>Alliance to Improve Dementia Care's Steering Committee Membership</i> Diane Ty, MBA, MA	Santa Monica, CA		25,000.00	25,000.00	
Philanthropy New York, Inc. <i>Membership Support</i> Kathryn O'Neal-Dunham	New York, NY		19,750.00	19,750.00	
Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE) <i>Membership Support</i> Michael Adams	New York, NY		5,000.00	5,000.00	
Society to Improve Diagnosis in Medicine <i>Membership Gold Level Support</i> Gerard Castro, PhD, MPH, PMP	Alpharetta, MD		25,000.00	25,000.00	
TOTAL MEMBERSHIPS/OTHER			147,350.00	147,350.00	

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	BALANCE DUE JAN 1, 2022	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2022
TOTAL PRESIDENT'S DISCRETIONARY GRANTS		699,999.00	699,999.00	
Discretionary Grants		72,500.00	72,500.00	-
Matching Grants		285,211.00	285,211.00	-
Trustees Award		1,000.00	1,000.00	-
Grants Refunded or Cancelled	500,000.00	(660,754.25)	(160,754.25)	-
Contingent Grant Adjustment **		(200,000.00)		(200,000.00)
Discount to Present Value	(289,623.00)	(2,530,767.00)		(2,820,390.00)
TOTAL (ALL GRANTS)	18,900,002.00	39,471,647.75	24,506,644.75	33,865,005.00

* The remaining grant commitment to Age Friendly Foundation was cancelled

** There is a contingency line for \$100K each for three years. At the end of 2022, GSA secured \$100K in matching funds the remaining \$200K for Years 2 and 3 will be released when the condition is met





Financials

The Foundation's investment portfolio was valued at approximately \$615 million at year-end 2022, reflecting a decline of approximately \$64 million before disbursement for grants, administrative expenses and taxes totaling \$32 million during the year.

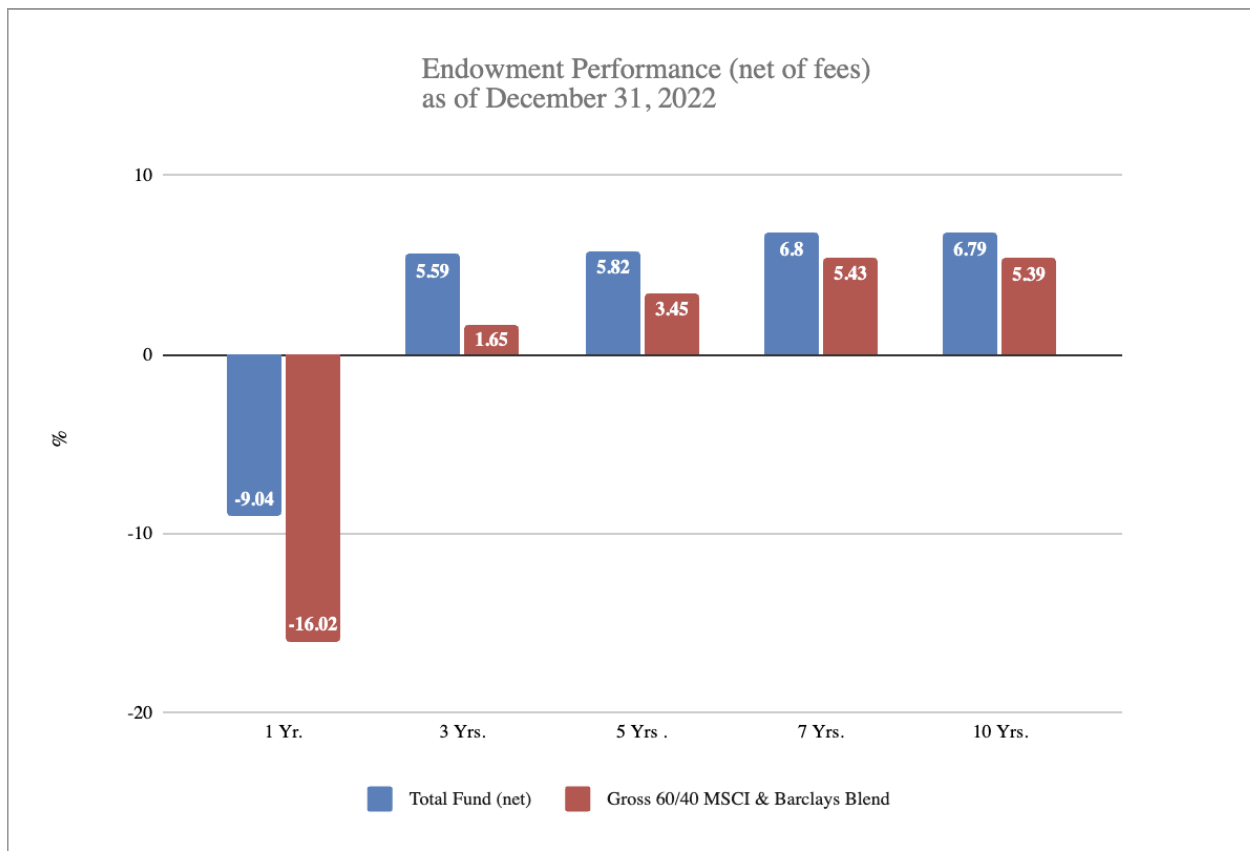
2022 was an extremely challenging year for financial markets with both stocks and bonds suffering double-digit losses. The extent to which both stocks and bonds sold off was rare and has only occurred 2% of the time in history dating back to 1926. This was mainly driven by the Federal Reserve's commitment to aggressively fight inflation by raising interest rates, and the increased probability of a U.S. recession. The U.S. market—represented by the S&P 500 index—ended the year down 18.1% while the U.S. fixed-income market, measured by the Bloomberg U.S. Aggregate index, declined 13.0% in 2022. International equities—represented by MSCI ACWI ex USA index GD—ended the year down 15.6%.

Despite the double-digit losses for 2022, the Foundation's portfolio returned negative 9% during the year. The alternative investments—hedge funds, private equity and private credit—recorded positive returns helping hedge the portfolio against volatility. To that end, the portfolio not only delivered solid relative performance against public markets, but also held up well against its peers. This is evidenced

by the 33rd percentile rank in Northern Trust's foundation and endowment universe for the one-year performance.

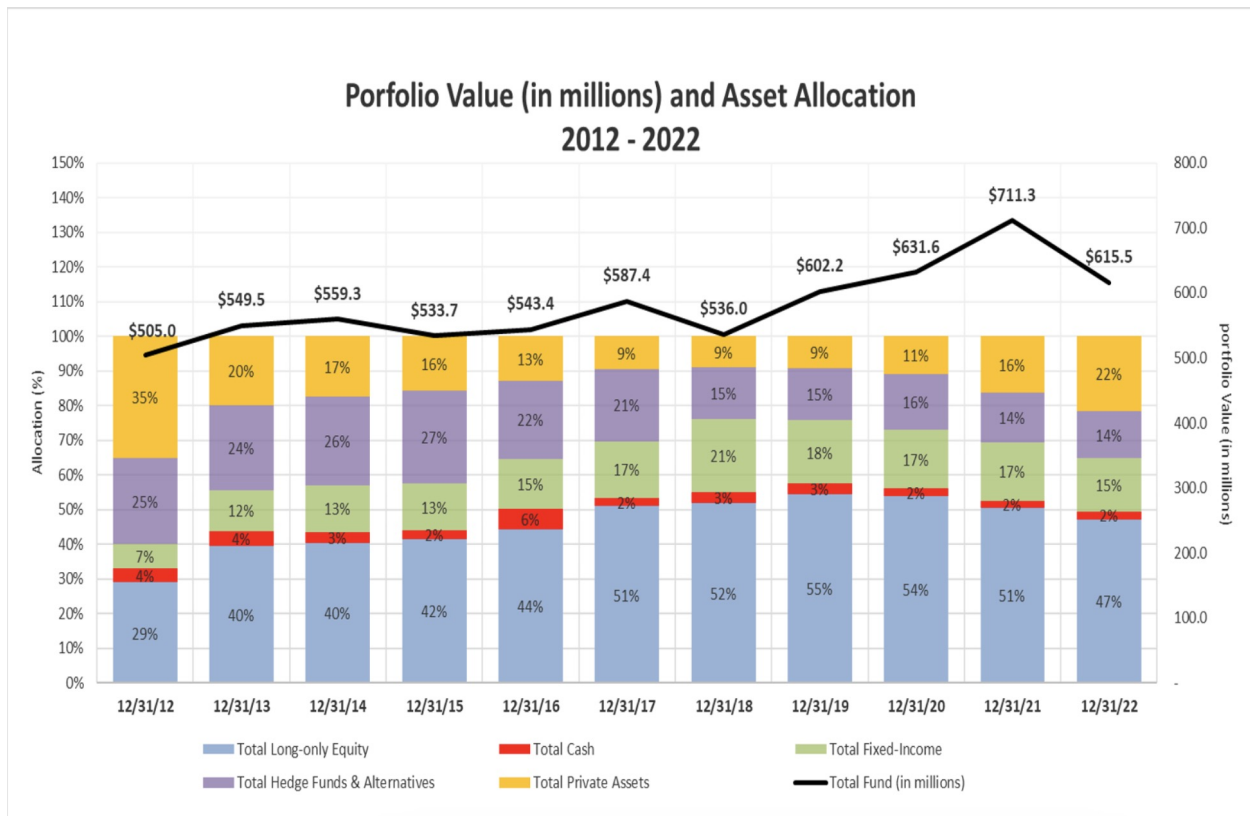
Over the course of 2022, the Foundation rebalanced its investments to its long-term target allocation and within each asset class in response to market conditions and the Foundation's spending needs. At the end of the year, the portfolio's asset mix was 47% long-only equities, 15% fixed-income, 2% cash, 14% hedge funds and a total of 22% in private assets. In comparison, the portfolio was comprised of 51% public equities, 17% fixed income, 2% cash, 14% hedge funds and 16% non-marketable alternatives as of the end of 2021. Furthermore, the strategic asset allocation was revised at the end of 2022 to increase the probability of maintaining the portfolio's purchasing power over the long run without impacting the risk target of the portfolio.

2022 also marks the 10th anniversary of Goldman's advisory services for the Foundation. The endowment, which was valued at \$505 million at the end of 2012, has grown by approximately \$110 million after total spending of \$268 million (in nominal value) during the last ten years. Under their guidance, our disciplined, prudent investment approach coupled with robust



diversification has served us well; the portfolio has consistently outperformed its Reference Benchmark (60% MSCI All Country World ND Index/40% Barclays U.S. Aggregate) for 2022, and the trailing 3, 5, 7 and 10 years.

Furthermore, with Goldman’s assistance, the Foundation has proactively redesigned its asset allocation guidelines while maintaining a moderate-plus-risk portfolio diversified across a wide array of asset classes and strategies. As a result, the portfolio has experienced significant asset allocation changes since 2012, a transition of assets from alternative investments (hedge funds and private assets) into traditional asset classes (long-only equity and fixed-income) during this period.



The Foundation’s investment objective continues to be securing maximum long-term total return on its investment portfolio to maintain a strong grants program, while assuring consistent growth of its assets at a level greater than the rate of inflation. Despite stubbornly high inflation and a challenging investment environment in 2022, we are pleased that the long-term performance of the Foundation’s portfolio—which had delivered an annualized net

investment return of 8.2% in the past 35 years—has remained ahead of the average inflation (2.8%) plus spending rate (4.9%) for a total of 7.7% per year.

While the markets are expected to be less turbulent in 2023, we remain vigilant to a wide range of risks, including hotter-than-expected inflation data, which may trigger the Federal Reserve to further hike interest rates, the threat of a U.S. recession, the implications of China’s abandonment of its “zero-COVID” policy and the on-going Russia-Ukraine war. In this uncertain environment, we are confident that our customized strategic asset allocation—designed to ride out volatility and provide staying power in the event of geopolitical disruptions—will continue to enable us to withstand dramatic market swings in 2023 and beyond.

The Finance Committee and the Board of Trustees meet regularly with Goldman Sachs to review asset allocation, investment strategy and the performance of the underlying investments. Northern Trust Corporation is the custodian for all the Foundation’s securities. A complete listing of investments is available for review at the Foundation’s offices. Audited financial statements were not completed in time for this publishing but will be available on the Foundation’s website in the summer.



Eva Cheng, CPA
Vice President, Finance





2022 Milestones

January

- **Health Affairs** publishes new installment in JAHF-sponsored Age-Friendly Health series detailing frontline support in long-term care facilities by informal caregivers.
- **Better Care Playbook** compiles resources exploring programs, practical tools and case studies that support family caregivers.
- **Institute for Healthcare Improvement** creates a free Open School course, “Providing Age-Friendly Care to Older Adults.”
- **JAHF** and **Institute for Healthcare Improvement** publish a book, *Age-Friendly Health Systems: A Guide to Using the 4Ms While Caring for Older Adults*.
- **American Society on Aging** announces ASA RISE program and inaugural cohort of leaders of color in the aging field.

February

- **National Academy for State Health Policy** launches a multimedia explainer to help policymakers educate the public about palliative care.
- **JAHF's *Age-Friendly Insights*** finds that most people living in the U.S. think direct care workers are underpaid and lack support.
- A **Center to Advance Palliative Care** report highlights effective strategies to improve the quality of life for those with serious illness while controlling costs.
- **American Academy of Home Care Medicine** launches The National Home Care Medicine Practice Directory.
- **Kaiser Health News** and **JAHF** collaborate on an interactive event about older adults' experience and resilience during the pandemic.

March

- **Institute for Healthcare Improvement** celebrates the recognition of 2,700 care locations as Age-Friendly Health Systems participants.
- **JAHF Board of Trustees** approves four grants totaling more than \$6 million.
- **Geriatric Emergency Department Collaborative** explains how emergency departments can receive accreditation for their approach to geriatric emergency care.
- **ADvancing States** announces state Medicaid programs selected for technical assistance to implement American Rescue Plan Act home and community-based services funding.

April

- The **National Academies of Sciences, Engineering, and Medicine** releases the first comprehensive report on nursing home quality in 35 years.
- **Patient Priorities Care** creates a toolkit containing resources and tools to help clinicians work with patients to identify and achieve their goals and priorities.
- **FrameWorks Institute** outlines preliminary findings on how members of the public think about nursing homes.
- **USAgings' Business Institute** debuts an evidence bank to help community-based organizations show their value as contracting partners to health care entities.

May

- **Reframing Aging Initiative** provides lessons on how to communicate about aging in ways that build support for policies in a short video series, *Frame of Mind*.
- **Home Centered Care Institute** launches a free course, “Diversity, Equity, and Inclusion for Home-Based Care.”
- **Best Practice Caregiving** features evidence-based dementia caregiving programs blog and infographic series.
- **National Collaboratory to Address Elder Mistreatment** develops an emergency department toolkit to improve screening for elder mistreatment.
- **Trust for America’s Health** launches an updated Age-Friendly Public Health Systems Recognition Program.

June

- **JAHF Board of Trustees** approves six grants totaling more than \$5 million.
- **JAHF** and **The SCAN Foundation** argue that person-driven outcome measures help achieve equitable outcomes in *Health Affairs*.
- **Next Avenue** produces a special series about the intersection of disability and aging in America.
- **JAHF** announces Marie A. Bernard, MD, as *The 2022 John A. Hartford Foundation Trustees Award* recipient for her long dedication to improving the lives of older adults.

July

- **American Hospital Association** announces ten Age-Friendly Fellows in the 2023 Next Generation Leadership program.
- **USAgings’ Business Institute** awards JAHF 2022 Business Innovation Award to Direction Home Aging & Disabilities for improving hospital to home care transitions.
- **NBC Universal** and **Telemundo** air televised segments about age-friendly care on affiliates across the country in English and Spanish.
- **JAHF Age-Friendly Insights** poll finds older adults prefer hospitals that provide age-friendly care.
- **Society to Improve Diagnosis in Medicine** and **National Academy of Medicine** select a Fellow and Scholar in Diagnostic Excellence for Older Adults.

August

- **Health and Aging Policy Fellows Program** announces a new class of fellows.
- **Diverse Elders Coalition** offers free training for health care, social service and aging professionals who want to better serve diverse family caregivers of older adults.
- **Coalition for Care Partners** highlights the developing, testing and scaling of consumer-oriented technologies to engage care partners.
- **Geriatrics Workforce Enhancement Program** develops an Age-Friendly Health Systems Case Studies series on primary care experiences with the 4Ms.

September

- **Convergence Center for Policy Resolution** issues a report proposing changes to America's systems of care that reflect the current and future needs of aging adults.
- **JAHF Board of Trustees** approves seven grants totaling more than \$17 million.
- **Moving Forward Nursing Home Quality Coalition** forms to advance recommendations from the National Academies report, *The National Imperative to Improve Nursing Home Quality*.
- **FAIR Health** creates a dedicated webpage for older adults and caregivers with new shared decision-making tools.
- **Center for Health Care Strategies** tool guides states interested in pursuing cross-sector partnerships to strengthen services for family caregivers.
- **U.S. Department of Health and Human Services** publishes the 2022 National Strategy to Support Family Caregivers.

October

- **CVS Health** video features resources for healthy aging, including age-friendly care offered at **MinuteClinics**.
- **Serious Illness and End-of-Life Funders Community** celebrates five years of collaboration in partnership with **Grantmakers In Aging**.
- **JAHF**, in partnership with **Education Development Center**, convenes a roundtable on comprehensive dementia care payment.

- **National PACE Association** launches Alliance for PACE Innovation and Quality to support advancement of expanded PACE access and growth.
- **Center to Advance Palliative Care** convenes a national briefing on its research findings on access to palliative care for Black patients with serious illness.

November

- **JAHF *Age-Friendly Insights*** poll finds broad, overwhelming support for policies to help family caregivers.
- **AARP**, in collaboration with **Geriatric Emergency Department Collaborative**, posts educational videos on dementia and delirium in emergency rooms.
- **National Academy for State Health Policy** reviews lessons from supporting six states interested in developing policies to support family caregivers.
- The **Serious Illness Messaging Toolkit** launches with resources for public messaging about serious illness care.

December

- **RUSH University Medical Center** shares learnings from their Age-Friendly Health Systems caregiver intervention program pilot.
- **JAHF Board of Trustees** approves six grants totaling more than \$12 million.
- **New York Academy of Medicine** recaps its first convening to advance New York State's Master Plan for Aging.
- **Hospice and Palliative Nurses Association** announces JAHF's Amy Berman as the HPNA Champion Award Winner.





The John A. Hartford Foundation

www.johnahartford.org

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