



2021 Annual Report



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 55 East 59th Street, 16th Floor New York, NY 10022

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Together with partners, we are seizing this moment and fueling transformative, systemic change.

A Message From Our Leadership

Reviewing our progress for 2021, we are proud of the remarkable work of our staff and grantees as they advance our mission to improve the care of older adults.

Whether we are engaged with our Age-Friendly Health Systems Action Communities, working with federal and state government partners or thinking through how to best support our family caregivers, the work is rich and meaningful. More importantly, we are helping make the changes we want to see.

Together with partners, we are seizing this moment and fueling transformative, systemic change.

Our mission over many years has prepared us for this season of possibility. In 2021, the Foundation led efforts to identify potential solutions to urgent issues vexing America's health system and its ability to provide quality care to older adults. Our long-term investments and commitment to leadership have resulted in evidence-based approaches that are actionable and readily adopted. Others are being ideated, implemented and tested. This is a time for innovation and action to strengthen and sustain the nation's workforce caring for older adults.

Bolstering the workforce that cares for us as we age is the most urgent issue in health care today.

The workforce that cares for older adults is better characterized as a careforce because their care is holistic and supports the older person's family and network. As our careforce,



they need our support. This community includes people who work in hospitals, clinics, nursing homes, social service agencies and public health, along with the millions of family caregivers who provide unpaid care. Our staff and partners are laser-focused on growing and supporting this careforce so that they can provide the care and services that align with what matters to older adults.

Dedication to health equity is imperative to ensure that every older adult receives the best care possible, no matter their age, race, sexual orientation or zip code.

Our commitment to raising awareness of ageism is aimed at countering its toxic consequences. Ageism still shapes the way many people, including those who work in health care, think and feel about older adults. It leads to poor outcomes and suffering. Through our communications, we are shifting narratives that fuel ageist thinking and behavior. We remain steadfast to our commitment to addressing the unacceptable disparities in quality of care and health outcomes that are based on demographics and inherent characteristics. We are working to highlight data that reflect inequity and support programs that improve the care of people from historically marginalized communities.

JAHF is known for its collaborative, solutions-driven approach that brings the right partners together.

An example of a successful collaboration is the Age-Friendly Health Systems initiative that spreads evidence-based practices to improve care for older adults by focusing on the 4Ms (what Matters, Medication, Mentation and Mobility). The Institute for Healthcare Improvement, the American Hospital Association and the Catholic Health Association of the United States are collaborating daily with more than 2,700 sites in all 50 states,

including each of CVS Health's MinuteClinic locations. They are documenting improvements in outcomes and costs as more than 1.4 million older adults have now received age-friendly 4Ms care.

In 2021, our Board proudly awarded The John A. Hartford Foundation Trustees Award to Don Berwick, MD, MPP, for his exceptional dedication and partnership in improving health care quality and safety for older adults. We are thankful to all JAHF collaborators and partners and are especially grateful to our visionary Trustees, who steadfastly guide the organization, especially in turbulent times, with foresight, grace and prudence.

This is the time for transformative change. This is the time to create a seamless health care system for the future that works for everyone. Please join us in helping the public and private sectors rethink care for older adults and make informed, consequential decisions that drive real improvement.

With gratitude,

Terry Fulmer, PhD, RN, FAAN *President*

Margaret L. Wolff Chair of the Board





Our Work

- · Home and Direct Care Workers
- · Family Caregivers
- Interprofessional and Cross-Sector Care Teams



They are more than a workforce. Home and direct care workers are a careforce. They conduct essential, skilled tasks that help older adults and people with disabilities live with dignity.

Home and Direct Care Workers

Recognition of the importance of home and direct care workers sharply increased during the pandemic, as did awareness of their often unsafe working conditions, low wages and lack of benefits.

JAHF is committed to supporting these essential careforce members through changes in policy and practice.

Supporting the Payment of \$500M in Federal Funding

The CDC invited a taskforce of volunteers, convened by JAHF, to advise states on how to distribute \$500 million allocated by the American Rescue Plan Act of 2021 to support nursing home strike teams and develop a longer-term infrastructure to support direct care workers. JAHF also co-funded ADvancing States to offer technical assistance to states using similar ARPA funds for home- and community-based services.

Setting Federal Priorities to Support Direct Care Workers

Our grantee PHI released a report with nearly 50 recommended policy priorities to support the



nation's direct care workforce across eight issue areas including compensation, training and leadership.

Advancing Research to Support Long-Term Care Workers

JAHF formally launched a new *Health Affairs'* Age-Friendly Health series in 2021.

Articles about home and direct care workers included:

- Nursing Home Staffing Levels Did Not Change Significantly During COVID-19
- Larger Nursing Home Staff Size Linked to Higher Number of COVID-19 Cases in 2020
- The Relationship Between States' Staffing Regulations and Hospitalizations of Assisted Living Residents
- Optimal Staffing Models to Care for Frail Older Adults in Primary Care and Geriatrics Practices in the US
- Trends in Home Care Versus Nursing Home Workforce Sizes: Are States Converging or Diverging Over Time?



Lifting Up Careforce Stories

In partnership with Kaiser Health News, JAHF hosted Unsung Heroes: The Crucial Role – and Tenuous Circumstances – of Home Care Workers During the Pandemic, exploring how home care workers supported the families of older adults and people with disabilities in the midst of COVID-19.

Updating Nursing Home Guidance

With support from JAHF and partners, the National Academies of Sciences, Engineering, and Medicine began work on a comprehensive report examining the nation's nursing homes—how they can be better operated, regulated, financed and staffed with the ultimate goal of improving care. The final report provides guidance on how to recruit, train and retain top talent in nursing homes, among other critical recommendations.

The Convergence Center for Policy Resolution initiated a yearlong project bringing together stakeholders with divergent views to build trust, identify consensus-based solutions and form action-oriented alliances to reimagine care for older adults in long-term care and other locations they call home.



Family caregivers are an integral part of the careforce. They are vital members of the health care team who serve as advocates, navigators and the safety net for older adults.

Family Caregivers

Millions of family caregivers provide billions of hours of services and support without the training and benefits other care providers receive. JAHF and its partners are paving the way for change at the federal, state and local levels to better assist these essential careforce members by providing practical resources to those who need them right now.

RAISE-ing Up Family Caregivers

In partnership with the Administration for Community Living, the National Academy for State Health Policy and other stakeholder organizations, JAHF helped release the RAISE Family Caregiving Advisory Council's Initial Report to Congress in 2021. The report outlines critical recommendations like paid leave and increased workplace protections to support family caregivers.

- The report also featured stories of family caregivers, detailing challenges and joys of providing daily care to a family member or friend.
- NASHP released two sections of its five-section policy roadmap to help state legislators adopt RAISE Act recommendations.



 JAHF Vice President of Program Rani Snyder penned an op-ed highlighting solutions to support family caregivers now in the state policymaker publication Route Fifty.



Providing Guidance on Hospital Stays

With AARP, JAHF funded a series of how-to videos to guide family caregivers through a family or friend's hospital stay. The videos include useful information on the 4Ms of age-friendly care: what Matters, Mentation, Medication and Mobility.



Preparing for the Caregiving Journey

Fast-Forward, a PBS documentary about family caregivers and aging, premiered and is being screened at community events throughout the United States. The documentary, supported

by JAHF and the Gordon and Betty Moore Foundation, follows four millennials and their parents as they consider how they want to age. It includes companion resources to help viewers plan for their own futures as older adults or caregivers, including email courses and guides from public media's *Next Avenue*.







JAHF recognizes and supports the teams of professionals that span disciplines and sectors, a key facet of an age-friendly careforce.

Interprofessional and Cross-Sector Care Teams

Collaboration across care team members is crucial for providing equitable, age-friendly care. These essential careforce members include nurses, physicians, pharmacists, physical therapists, social workers, direct care workers, public health experts, community-based social service providers and many others, including family caregivers, who work in concert to meet the needs of older adults. JAHF has supported innovations in careforce training and coordination in 2021 through bold grantmaking.

Solving Problems with Innovative Team-Based Solutions

The JAHF Tipping Point Challenge, facilitated by the Center to Advance Palliative Care, highlighted innovative programs supporting individuals with serious illnesses. 2021 gold winners included:

Sarasota Memorial Hospital's Primary
 Palliative Care RN Resource Team Initiative
 featured a group of nurses working to spread
 palliative care system-wide using CAPC's
 online resources and in-person mentorship.



- The Academic Model Providing Access to Healthcare Consortium, led by Indiana University School of Medicine, increased hospice and palliative care services in Kenya by developing training programs for Kenyan nurses, clinical officers and physicians.
- The palliative care teams at Parkland
 Hospital and UT Southwest Medical Center
 sent patients weekly text alerts to intervene
 before a crisis occurs through their Texting
 to Find the Tipping Point project, avoiding
 unnecessary emergency room visits and
 hospitalizations.

Other JAHF-funded projects offering innovative provider training include the Teaching Nursing Home program pilot, launched in Pennsylvania in partnership with the Jewish Healthcare Foundation and its Health Careers Futures program and co-funded by the Henry L. Hillman Foundation and Independence Foundation. The model helps students foster careers in geriatrics and nursing home leadership.



Developing Future Careforce Leaders

The American Hospital Association announced the newest Age-Friendly Cohort of its Next Generation Leaders Fellowship, a program supporting individuals executing transformative projects that address a specific challenge within their health care organization.

Fostering Collaboration Across Teams

The JAHF Business Innovation Award. coordinated by USAging (formerly the National Association of Area Agencies on Aging) and its Aging and Disability Business Institute, recognized aging and disability communitybased organizations that improved the wellbeing of older adults. The 2021 recipient, Hebrew SeniorLife, was recognized for its Right Care, Right Place, Right Time: Effectively Integrating Senior Care and Housing (R3) program, which embeds a nurse and a social worker in senior housing, improving access to care and resources. The runners-up for the award were DayBreak Adult Care Centers, which was recognized for its Rapid Response Case Management program, and Area Agency on Aging and Disabilities of Southwest Washington and its Community Paramedicine program.

Advancing Age-Friendly Care Through the Public Health Careforce

The Age-Friendly Public Health Systems initiative, led by Trust for America's Health, recognized the New York State Department of Health and the Department of Health in Sarasota County, Florida in 2021 for expanding community-based support of healthy aging.







About Us

- · Leadership and Staff
- Grants
- Financials

Leadership and Staff

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Grants Manager

Jinghan Zhang

Intern



Grants

We funded a robust roster of 21 new grants totaling \$15,944,666 million to improve the care of older adults. The Foundation made \$21,648,121 million in payments to existing grants in 2021.

First Quarter 2021

Trust for America's Health

\$150,000

Ensuring Access to the COVID-19 Vaccine for Homebound Older Adults and Individuals with Disabilities

National Committee for Quality Assurance

\$1,459,244

Supporting Age-Friendly Health Systems: Implementing and Disseminating Person-Driven Outcome Measures

Second Quarter 2021

University of North Carolina at Chapel Hill

\$925,268

Geriatric Emergency Department Collaborative (GEDC) 3.0: Expanding Dissemination and Enhancing Evaluation

Yale University

\$680,803

Geriatric Emergency Department Collaborative (GEDC) 3.0: Expanding Dissemination and Enhancing Evaluation



Age-Friendly Foundation (dba Age-Friendly Institute)	\$1,500,000
Promoting an Age-Friendly Ecosystem: Harnessing Consumer Insights to Advance "Age-Friendly" in Health Care and Across Settings	
Beth Israel Deaconess Medical Center	\$1,476,784
Engaging Family Caregivers through Shared Access to the Electronic Health Record	
Health Careers Futures	\$594,110
Revisiting the Teaching Nursing Home	
Convergence Center for Policy Resolution	\$453,777
Convergence Dialogue on Reimagining Care for Older Adults	
FAIR Health	\$233,022
A National Initiative to Advance Cost Information in Shared Decision-Making for Serious Health Conditions	

Third Quarter 2021

American College of Surgeons Geriatric Surgery Verification (GSV) Phase II: Evaluation and Improvement	\$1,987,215
Education Development Center	\$1,650,000
National Collaboratory to Address Elder Mistreatment	
National Collaboratory to Address Elder Mistreatment Phase III: Expanding the Impact of the Elder Mistreatment Emergency Department Toolkit	



Fourth Quarter 2021

Iniversity of California, Los Angeles	\$2,093,074
CLA Alzheimer's and Dementia Care Program: reating a Sustainable Health Systems Model for ational Dissemination	
iverse Elders Coalition	\$1,350,000
trengthening Training and Advocacy Capacity to upport Diverse Family Caregivers	
est Practice Caregiving Phase III: Consumer Version	\$450,000
merican Society on Aging dvancing Equity in Aging	\$341,725
enter for Health Care Strategies	\$200,000
evelopment of the Better Care Playbook, Phase VI	
lational Investment Center for eniors Housing & Care	\$100,000
ational Study on the Impact of COVID-19 in enior Living, Phase II	
lational Academies of Sciences, ngineering, and Medicine	\$95,000
dvancing Diagnostic Excellence: A Workshop Series	
lational Academies of Sciences, ngineering, and Medicine	\$94,644
ational Academy of Medicine Scholars in iagnostic Excellence	
dvancing Diagnostic Excellence: A Workshop Series lational Academies of Sciences, ngineering, and Medicine ational Academy of Medicine Scholars in	



Society to Improve Diagnosis in Medicine Diagnostic Excellence Small Grants Program	\$60,000
Society to Improve Diagnosis in Medicine Fellowship in Diagnostic Excellence Program	\$50,000

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, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
AGING & HEALTH					
AGE-FRIENDLY HEALTH SYSTEMS					
Age Friendly Foundation, Inc. dba Age-Friendly Institute Promoting an Age-Friendly Ecosystem: Harnessing Consumer Insights to Advance "Age Friendly" in Health Care and Across Settings Tim Driver Jody Shue, MPH	Waltham, MA		1,500,000	500,000	1,000,000
American Academy of Home Care Medicine Moving and Scaling Home-Based Primary Care Phase II: Quality, Training and Advocacy K. Eric DeJonge, MD	Baltimore, MD	193,500		135,250	58,250
American College of Surgeons Geriatric Surgery Verification (GSV) Phase II: Evaluation and Improvement Clifford Y. Ko, MD, MS, MSHS, FACS, FASCRS	Chicago, IL		1,987,215	620,894	1,366,321
American Geriatrics Society, Inc. Geriatrics Workforce Enhancement Program (GWEP) Coordinating Center, Phase II Nancy E. Lundebjerg, MPA	New York, NY	1,733,148		761,042	972,106
American Geriatrics Society, Inc. Catalyzing Emergency Department Enhancements for Older Adults: Geriatric Emergency Department Collaborative (GEDC 2.0), Phase 2 Nancy E. Lundebjerg, MPA	New York, NY	100,033		100,033	0
Case Western Reserve University Age-Friendly Health Systems: Ambulatory Care Continuum Implementation Mary A. Dolansky, PhD, RN, FAAN	Cleveland, OH	1,494,814		804,500	690,314
Center for Health Care Strategies, Inc. Development of the Better Care Playbook, Phase V Allison Hamblin, MSPH	Hamilton, NJ	102,805		102,805	0
Center for Health Care Strategies, Inc. Development of the Better Care Playbook, Phase VI Lorie Martin	Hamilton, NJ		200,000	100,000	100,000
Convergence Center For Policy Resolution Convergence Dialogue on Reimagining Care for Older Adults Stuart M. Butler, PhD	Washington, DC		453,777	435,777	18,000



			GRANTS		BALANCE DUE	
		BALANCE DUE JAN 1, 2021	AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	DEC 31, 2021	
Education Development Center, Inc. National Collaboratory to Address Elder Mistreatment Phase III: Expanding the Impact of the Elder Mistreatment Emergency Department Toolkit Rebecca Stoeckle	Waltham, MA		1,650,000	581,799	1,068,201	
Education Development Center, Inc. National Collaboratory to Address Elder Mistreatment Rebecca Stoeckle	Waltham, MA	439,265		439,265	C	
Emergency Medicine Foundation of the American College of Emergency Physicians Geriatric Emergency Department Accreditation: Expansion Phase II Sandra Schneider, MD, FACEP	Irving, TX	252,898		0	252,898	
Health Careers Futures Revisiting the Teaching Nursing Home Nancy Zionts, MBA	Pittsburgh, PA		594,110	291,174	302,936	
Health Research and Educational Trust of the American Hospital Association Next Generation Leaders Transformation Institute: 1) Developing Age-Friendly Health Systems Leadership; 2) Transforming HRET's HIIN Hospitals to Become More Age-Friendly Marie Cleary-Fishman	Chicago, IL	769,497		441,964	327,533	
Home Centered Care Institute Moving and Scaling Home-Based Primary Care, Phase II: Quality, Training and Advocacy Melissa Singleton, M.Ed.	Schaumburg, IL	302,500		151,250	151,250	
Icahn School of Medicine at Mount Sinai Scaling and Dissemination of Hospital at Home in the Time of COVID-19 and Beyond Albert L. Siu, MD, MSPH	New York, NY	1,024,994		0	1,024,994	
Institute for Healthcare Improvement Age-Friendly Health Systems Initiative, Phase II Kedar Mate, MD	Boston, MA	3,446,203		891,506	2,554,697	
Massachusetts General Hospital Moving and Scaling Home-Based Primary Care, Phase II: Quality, Training and Advocacy Christine Ritchie, MD, MSPH Bruce Leff, MD	Boston, MA	518,947		322,955	195,992	
National Academy of Sciences Advancing Diagnostic Excellence: A Workshop Series Sharyl Nass, PhD	Washington, DC	0	95,000	0	95,000	



		BALANCE DUE JAN 1, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
National Academy of Sciences National Academy of Medicine Scholars in Diagnostic Excellence Gregg S. Margolis, PhD	Washington, DC	0	94,644	0	94,644
National Academy of Sciences The Quality of Care in Nursing Homes: Getting Ahead of the Crises Sharyl Nass, PhD	Washington, DC	545,455		545,455	0
National Association of Area Agencies on Aging, Inc. now USAging Aging and Disability Business Institute, Phase 2: Advancing Integration, Partnerships and Payment Models Between Social Services and Health Systems Sandy Markwood	Washington, DC	1,003,405		1,003,405	0
National Committee for Quality Assurance Supporting Age-Friendly Health Systems: Implementing and Disseminating Person-Driven Outcome Measures Caroline Blaum, MD, MS	Washington, DC	0	1,459,244	625,951	833,293
National Investment Center for Seniors Housing & Care, Inc. National Study on the Impact of COVID-19 in Senior Living, Phase II Beth Mace, MS	Annapolis, MD	0	100,000	100,000	0
National PACE Association PACE 2.0 Growth Strategy Implementation Peter Fitzgerald, MSc	Alexandria, VA	285,416		285,416	0
Regents of the University of California, San Francisco Implementation, Scaling and Impact of the 4Ms in an IT-enabled Health Care System Julia Adler-Milstein, PhD	San Francisco, CA	554,461		554,461	0
Research Foundation for Mental Hygiene, Inc. Health and Aging Policy Fellows Program Harold Alan Pincus, MD	Menands, NY	1,198,068		595,261	602,807
Society to Improve Diagnosis in Medicine, Inc. Diagnostic Excellence Small Grants Program Jennie Ward-Robinson, PhD Gerard Castro, PhD, MPH, PMP	Alphartta, GA	0	60,000	0	60,000
Society to Improve Diagnosis in Medicine, Inc. Fellowship in Diagnostic Excellence Program Jennie Ward-Robinson, PhD Gerard Castro, PhD, MPH, PMP	Alphartta, GA	0	50,000	0	50,000



		BALANCE DUE JAN 1, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
Trust for America's Health Expanding Age-Friendly Public Health Systems, Phase II J. Nadine Gracia, MD, MSCE	Washington, DC	1,359,195		745,243	613,952
Trust for America's Health Ensuring Access to the COVID-19 Vaccine for Homebound Older Adults and Individuals with Disabilities J. Nadine Gracia, MD, MSCE	Washington,DC	0	150,000	150,000	0
University of North Carolina at Chapel Hill Geriatric Emergency Department Collaborative (GEDC) 3.0: Expanding Dissemination and Enhancing Evaluation Kevin Biese, MD	Chapel Hill, NC	0	925,268	460,885	464,383
Yale University Geriatric Emergency Department Collaborative (GEDC) 3.0: Expanding Dissemination and Enhancing Evaluation Ula Hwang, MD	New Haven, CT	0	680,803	330,125	350,678
Yale University Patient Priorities Care: Dissemination and Scaling Mary E. Tinetti, MD	New Haven, CT	1,499,981		749,857	750,124
TOTAL AGE-FRIENDLY HEALTH SYSTEMS		16,824,585	10,000,061	12,826,273	13,998,373
FAMILY CAREGIVING					
Benjamin Rose Institute on Aging Best Practice Caregiving Phase III: Consumer Version David M. Bass, PhD	Cleveland, OH	0	450,000	236,204	213,796
Benjamin Rose Institute on Aging Dissemination of Best Practice Caregiving: Guiding Organizations to Dementia Programs for Family Caregivers David M. Bass, PhD	Cleveland, OH	132,945		132,945	0
Beth Israel Deaconess Medical Center, Inc. Engaging Family Caregivers through Shared Access to the Electronic Health Record Catherine DesRoches, DrPH Jennifer Wolff, PhD	Boston, MA		1,476,784	481,536	995,248
Center for Health Care Strategies, Inc. Helping States Support Family Caregivers Caring for an Aging America, Phase II Courtney Roman, MA	Hamilton, NJ	179,928		0	179,928



		BALANCE DUE JAN 1, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
Center for Health Policy Development dba National Academy for State Health Policy The RAISE Act Family Caregiver Resource and Dissemination Center Kitty Purington, JD	Portland, ME	849,928		694,491	155,437
Diverse Elders Coalition Fiscal Sponsor: Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE) Strengthening Training and Advocacy Capacity to Support Diverse Family Caregivers Lauren Pongan, MA	New York, NY	0	1,350,000	457,394	892,606
Diverse Elders Coalition Fiscal Sponsor: Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE) Addressing Unmet Family Caregiving Needs in Diverse Older Communities Lauren Pongan, MA	New York, NY	592,295		592,295	0
Johns Hopkins University Engaging Family Caregivers through Shared Access to the Electronic Health Record: Planning for Transformational Change Jennifer L. Wolff, PhD	Baltimore, MD	136,991		136,991	0
Regents of the University of California, Los Angeles Dissemination of the UCLA Alzheimer's and Dementia Care Program David B. Reuben, MD	Los Angeles, CA	482,825		482,825	0
Regents of the University of California, Los Angeles UCLA Alzheimer's and Dementia Care Program: Creating a Sustainable Health Systems Model for National Dissemination David B. Reuben, MD	Los Angeles, CA	0	2,093,074	698,084	1,394,990
Rush University Medical Center A Model for Caregiver Health and Wellness in Age-Friendly Health Systems, Planning Grant Robyn Golden, LCSW	Chicago, IL	212,389		0	212,389
TOTAL FAMILY CAREGIVING		2,587,301	5,369,858	3,912,765	4,044,394



			GRANTS		
		BALANCE DUE JAN 1, 2021	AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
SERIOUS ILLNESS & END OF LIFE					
Center for Health Policy Development dba National Academy for State Health Policy Expanding and Sustaining the Continuum of Care: A Resource Hub for State Policymakers Kitty Purington, JD	Portland, ME	249,479		249,479	C
FAIR Health, Inc. A National Initiative to Advance Cost Information in Shared Decision-Making for Serious Health Conditions Ali Russo	New York, NY		233,022	165,784	67,238
Icahn School of Medicine at Mount Sinai The Center to Advance Palliative Care (CAPC): Improving Access to Quality Palliative Care Brynn Bowman, MPA	New York, NY	585,649		585,649	C
National Academy of Sciences Roundtable on Quality Care for People with Serious Illness, Phase II Laurene Graig, MS	Washington, DC	83,333		83,333	C
University of Washington Building Public Engagement and Access to Palliative & End-of-Life Care Anthony Back, MD	Seattle, WA	994,975		875,083	119,892
TOTAL SERIOUS ILLNESS & END OF LIFE		1,913,436	233,022	1,959,328	187,130
LEGACY GRANTS					
ACADEMIC GERIATRICS AND TRAINING					
American Federation for Aging Research, Inc. Paul B. Beeson Career Development Awards in Aging Research Partnership Renewal Odette van der Willik	New York, NY	288,424		288,424	C
TOTAL LEGACY GRANTS		288,424		288,424	C
COMMUNICATIONS & SPECIAL PROJECTS					
Gerontological Society of America Sustaining the Reframing Aging Initiative Patricia D'Antonio, BSPharm, MS, MBA, BCGP	Washington, DC	200,000		200,000	(



		BALANCE DUE JAN 1, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
Henry J. Kaiser Family Foundation Highlighting Aging & Health: The Older Adult Reporting Project David Rousseau	San Francisco, CA	1,538,041		871,804	666,237
Project HOPE - The People-to-People Health Foundation, Inc. Publishing and Disseminating Lessons on Innovations in Health Care to Support Age-Friendly Health Alan Weil	Bethesda, MD	249,652		249,652	0
SPECIAL AGING INITIATIVES					
American Society on Aging Advancing Equity in Aging Patrice Dickerson, PhD Leanne Clark-Shirley, PhD	San Francisco, CA	0	341,725	125,344	216,381
Grantmakers In Aging Core Support Renewal: Developing the Lens in Philanthropy and Beyond Lindsay A. Goldman, LMSW	Arlington, VA	155,393		78,283	77,110
TOTAL COMMUNICATIONS & SPECIAL PROJECTS		2,143,086	341,725	1,525,083	959,728
TRUSTEE AWARD					
Neighbor to Neighbor Massachusetts Education Fund Inc. The John A. Hartford Foundation Trustee Award honoring Donald Berwick Andrea Nyamekye	Boston, MA		20,000	20,000	0
TOTAL TRUSTEE AWARD		0	20,000	20,000	0
TOTAL AGING & HEALTH GRANTS		23,756,832	15,964,666	20,531,873	19,189,625
PRESIDENT'S DISCRETIONARY GRANTS	;				
PARTNERSHIP					
AcademyHealth Health Datapalooza and National Health Policy Conference Sandy McNeil	Washington, DC		10,000	10,000	0



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Age Friendly Foundation, Inc. dba Age-Friendly Institute Age-Friendly Ecosystems Event Series Tim Driver	Waltham, MA		30,000	30,000	0
Connected Foundation, Inc. Health Advocacy Series for Older Adults Bhav Jain	Wellesley, MA		10,000	10,000	0
Education Development Center, Inc. Implement a Cross-Sector Consensus Building Process to Design and Produce an Age-Friendly Ecosystem Framework Kim Dash, PhD, MPH	Waltham, MA		7,961	7,961	0
Gerontological Society of America Annual Scientific Meeting Sponsorship James C. Appleby, BSPharm, MPH	Washington, DC		15,000	15,000	0
Grantmakers In Aging Annual Conference Sponsorship Lindsay A. Goldman, LMSW	Arlington, VA		25,000	25,000	0
Hebrew Home for the Aged at Riverdale Foundation There's No Place Like Home 104th Annual Gala Patricia Weiss	Riverdale, NY		14,000	14,000	0
LeadingAge, Inc. Nurse Management in Long-Term Services and Supports Meeting Katie Smith Sloan	Washington, DC		20,000	20,000	0
Medicare Rights Center, Inc. Annual Awards Virtual Event Frederic Riccardi	New York, NY		6,000	6,000	0
National Academy of Sciences Forum on Aging, Disability and Independence Tracy A. Lustig, DPM, MPH	Washington, DC		25,000	25,000	0
New York Academy of Medicine Annual Fund for Healthy Equity Judith A. Salerno, MD, MS	New York, NY		10,000	10,000	0
United Hospital Fund of New York Annual Gala Anthony Shih, MD, MPH	New York, NY		1,000	1,000	0
TOTAL PARTNERSHIP			173,961	173,961	0



	BALANCE [JAN 1, 2		AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
PROGRAM DEVELOPMENT				
Alosa Health, Inc. Education Program on Aduhelm (aducanumab) for Health Care Professionals, Patients, and Families, Initial Support Jerry L. Avorn, MD	Boston, MA	40,000	40,000	0
Alosa Health, Inc. Education Program on Aduhelm (aducanumab) for Health Care Professionals, Patients, and Families, Continued Support Jerry L. Avorn, MD	Boston, MA	36,189	36,189	0
American Telemedicine Association Next Steps Campaign Ann Mond Johnson	Arlington, VA	25,000	25,000	0
Brandeis University The Impact of COVID-19 on the Long-Term Care Workforce Peter I. Buerhaus, PhD, RN, FAAN	Waltham, MA	10,000	10,000	0
Bright Focus Foundation Documentary: Gene Wilder His Life, Legacy and Battle with Alzheimer's Disease Nancy Lynn	Clarksburg, MD	50,000	50,000	0
Convergence Center For Policy Resolution Outreach Strategy to Promote Rethinking Care of Older Adults, Phase I to Media and Key Influencers Stuart M. Butler, PhD	Washington, DC	15,000	15,000	0
Documentary Educational Resources, Inc. Public Radio Documentary Series: Aging at Home, Stories of Transition and Dignity Alice Apley, PhD	Watertown, MA	10,000	10,000	0
Duke University Leveraging Payment Reforms to Transform and Expand Home-Based Care for People with Complex Health Needs Robert Saunders, PhD	Durham, NC	20,000	20,000	0
Foundation of New York State Nurses, Inc. Nightingale Gala Deborah Elliott, MBA, BSN	Guilderland, NY	10,000	10,000	0
Grantmakers In Health GIH Palliative Care Programming, 2021-2023 Beth Harris	Washington, DC	17,500	17,500	0



			CDANTS		
		BALANCE DUE JAN 1, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
National Council of Young Men's Christian Associations of the United States of America (Y-USA) Older Adult Healthy Living, Learning Continuation Lyndsey Frigm, MA, CFRE	Chicago, IL		50,000	50,000	0
National Medical Association, Inc. Annual Convention and Scientific Assembly Martin Hamlette, JD, MHA	Silver Spring, MD		7,500	7,500	0
New York Academy of Medicine New York Age-Friendly Ecosystem Summit Judith A. Salerno, MD, MS	New York, NY		20,000	20,000	0
Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE) Feasibility Study for a PACE Program Focused on LGBT+ Older Adults Michael Adams	New York, NY		20,000	20,000	0
United Hospital Fund of New York Development of a Book on Health Policy by Bruce Vladeck Chad Shearer	New York, NY		10,000	10,000	0
TOTAL PROGRAM DEVELOPMENT			341,189	341,189	0
MEMBERSHIPS/OTHER GRANTS					
AcademyHealth Annual Support Sandy McNeil	Washington, DC		2,000	2,000	0
Grantmakers In Aging Annual Support Lindsay A. Goldman, LMSW	Arlington, VA		10,000	10,000	0
Grantmakers In Health Annual Support Cara V. James, PhD	Washington, DC		17,000	17,000	0
Hispanics in Philanthropy Annual Support Rebecca English	Oakland, CA		5,000	5,000	0
LeadingAge, Inc. Annual Support Sherry Shultz	Washington, DC		1,100	1,100	0



		BALANCE DUE JAN 1, 2021	GRANTS AUTHORIZED DURING YEAR	AMOUNT PAID DURING YEAR	BALANCE DUE DEC 31, 2021
Milken Institute Alliance to Improve Dementia Care's Steering Committee Membership Nora Super, MPA	Santa Monica, CA		25,000	25,000	0
Philanthropy New York, Inc. Annual Support Kathryn O'Neal-Dunham	New York, NY		19,750	19,750	0
Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE) Annual Support Michael Adams	New York, NY		5,000	5,000	0
TOTAL MEMBERSHIPS/OTHER			84,850	84,850	0
TOTAL PRESIDENT'S DISCRETIONARY	GRANTS		600,000	600,000	0
Discretionary Grants			70,250	70,250	
Matching Grants			456,510	456,510	
Grants Refunded or Cancelled			-10,511	-10,511	
Discount to Present Value		-378,643	89,020		-289,623
TOTAL (ALL GRANTS)		23,378,189	17,169,934	21,648,121	18,900,002

 $^{^*}$ The Grant Authorized listed above reflect an additional award of \$29,644 associated with the Diagnostic Excellence Initiative approved by the Board in March 2022.





Financials

Financial Summary

In 2021, global stocks delivered double-digit gains for the third year in a row, boosted by historic government response globally, the rapid development and approval of vaccines, strong corporate earnings, and pent-up consumer demand. Despite the threat of rising inflation, higher interest rates and the rapid spread of the omicron coronavirus variant, the U.S. market finished the year in record territory with a 28.7 percent gain for the S&P 500 index which notched 70 all-time highs during the year. On the other hand, bond markets had a difficult year due to high inflation and prospects for tighter monetary policy.

To that end, strong performance from equities, both public and private, propelled the Foundation's endowment to a new record high at the end of 2021; the portfolio value had appreciated to approximately \$711 million, increasing by almost \$80 million after disbursement for grants, administrative expenses and taxes totaling \$29 million during the year.

Despite the acceleration in the inflation rate, which was the highest in nearly four decades, the Foundation's portfolio delivered an impressive return of 17.4% during the year, outpacing the inflation plus spending rate by a wide margin. In addition, the portfolio allocation—which is well-diversified across a wide range of asset classes and strategies—was rewarded in 2021, well ahead of its Reference Benchmark (60% MSCI All Country World/40% Barclays Aggregate Bond) during the year. Over the last 10 years, under Goldman Sachs's advisement, our disciplined, prudent investment approach coupled with robust diversification has served us well; the portfolio surpassed both inflation plus spending rate and the 60/40 Reference Benchmark on a cumulative basis.

Over the course of 2021, with the assistance of Goldman, the Foundation had proactively rebalanced its investments to its long-term target allocation and within each asset class in response to market conditions. The Foundation has made significant progress in increasing exposure to private equity, partially contributed by stellar returns during the year. At the end of the year, the portfolio's asset mix was 51 percent long-only equities, 17 percent fixedincome, 2 percent cash, 14 percent hedge funds, and a total of 16 percent in private assets. In comparison, the portfolio was comprised of 54 percent public equities, 16 percent fixed-income, 3 percent cash, 16 percent in hedge funds, and 11 percent in nonmarketable alternatives as of the end of 2020.

As we entered 2022, uncertainty has become the predominant theme. Market volatility has substantially increased due to concerns about rising inflation and the likelihood of multiple interest rate hikes this year, followed by unexpected elevated geopolitical risks because of Russia's invasion of Ukraine. As pandemicinduced uncertainty eases, the world GDP growth is expected to be above the trend in 2022, the risk of recession in the U.S. and globally will likely remain low, and elevated inflation levels will probably moderate over the

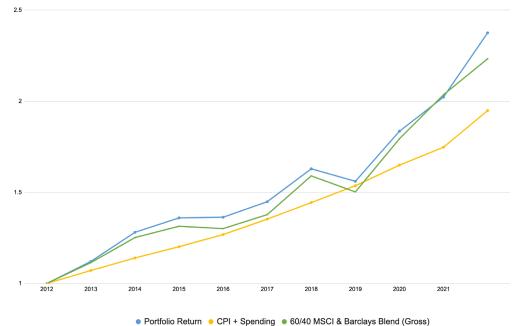
course of 2022. However, increased escalation of the Russia-Ukraine crisis could be the key risk to this economic outlook.

While preparing for more muted returns and heightened volatility, we are confident that our portfolio has been well-positioned to capitalize on investment opportunities as well as to withstand dramatic market swings in the financial markets in 2022 and beyond. Meanwhile, we will stay the course by continuing to closely reassess the strategic asset allocation and to focus on the quality of the underlying managers.

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 Vice President, Finance

Portfolio Return vs. CPI+Spending Rate & 60/40 MSCI World/Barclys Blend for Years 2012-2021





Year in Review

· 2021 Milestones

2021 Milestones

01 January



- Health Affairs publishes "Actualizing Better Health and Health Care for Older Adults" detailing key priorities to improve the care of older adults in 2021 by JAHF's Terry Fulmer.
- The Healthcare Association of New York State begins its second Age-Friendly Health Systems Action Community.
- The Center for Health Care Strategies announces the selection of eight states—IN, IA, MI, MN, NY, TN, TX and WA— to join the Helping States Support Families Caring for an Aging America Initiative.
- A *Health Affairs Forefront* article explains how the Age-Friendly Health Systems initiative incorporates key health equity principles.
- The *Journal of the American Medical Association* publishes a JAHF-funded study evaluating how information is shared when patients transition from hospitals to skilled nursing facilities.
- PHI shares an extensive examination of today's direct care workforce providing eight recommendations for policy and practice.
- The National Academies of Sciences, Engineering, and Medicine's Committee on the Quality of Care in Nursing Homes holds its first in a series of public webinars to inform its final report.
- The Geriatric Emergency Department Collaborative holds a webinar on best practices to improve the care of older adults with COVID-19 in emergency rooms.



02 February



- *Next Avenue* publishes an article by JAHF's Terry Fulmer exploring the relationship between COVID-19 and age-friendly health care.
- National Home-Based Primary Care Learning Network announces 10 new practices joining the network.
- The National Academy for State Health Policy releases In Their Own Words
 Family Caregivers from Across the Country Share their Priorities and Recommendations.
- The American Hospital Association creates Age-Friendly Health Systems initiative resources, including a Value Initiative Issue Brief and case studies from participant sites.
- Justice in Aging produces an updated guide giving nursing home residents, family members and other advocates tools to resolve common problems.
- The RAND Corporation publishes a perspective detailing why and how family caregivers should be integrated into health care teams informed by JAHF's OpenNotes grant with Johns Hopkins.
- The National Academy for State Health Policy creates an interactive map tracking state palliative care legislative and budget initiatives.



- JAHF announces nearly 2,000 sites have joined the nationwide Age-Friendly Health Systems initiative.
- The Reframing Aging Initiative launches a website with resources and information on countering ageism by changing the way society talks about aging.
- The PBS documentary Fast-Forward airs.
- The Diverse Elders Coalition releases a toolkit for providers with guidance on meeting the needs of diverse family caregivers.
- AARP and JAHF host a webinar with health care leaders on how hospitals can support family caregivers through care transitions featuring JAHF's Rani Snyder.
- The *Journal of Aging and Health* publishes a paper co-authored by JAHF's Terry Fulmer and Amy Berman examining how the 4Ms of age-friendly care improve outcomes across the care continuum.
- The Urban Institute shares a brief from 31 long-term care experts, including JAHF's Terry Fulmer, demonstrating how the U.S. can improve long-term care in the wake of the COVID-19 pandemic.
- JAMA Network publishes study results demonstrating that hospitals with Geriatric Emergency Department interventions experience strong financial savings.
- The JAHF Board of Trustees approves more than \$1.6 million in grants.
- The American College of Surgeons announces the first hospital to meet the Geriatric Surgery Verification program quality standards.



04 April



Geriatric Surgery Verification Implementation Course

- Trust for America's Health holds a series of discussions on improving access to the COVID-19 vaccine for homebound older adults.
- The podcast series *This is Getting Old* posts an episode and blog on agefriendly ecosystems, featuring JAHF's Terry Fulmer and Amy Berman.
- Trust for America's Health unveils the Age-Friendly Public Health Systems initiative online resource portal.
- The American College of Surgeons launches an Implementation Course to guide hospitals through its Geriatric Surgery Verification program.
- "Live Your Best Life With Age-Friendly Care" airs on NBC Universal and Telemundo featuring JAHF's Terry Fulmer and Marcus Escobedo, bringing information about age-friendly care directly to consumers.
- The Milken Institute publishes a report examining health and economic disparities in dementia for African Americans and Latinos.
- The Center for Medicare Advocacy writes an issue brief examining how the reality of home health coverage sometimes conflicts with the law.
- Grantmakers in Aging and the Coalition to Transform Advanced Care conduct a webinar highlighting the role of faith leaders in connecting people to health-related resources during the COVID-19 pandemic.



What Family Caregivers Need: Findings from Listening Sessions By Eileen J. Tell, Mph Pamela Nadash, Phd Marc A. Cohen, Phd May 17, 2021

- Duke University's Margolis Center for Health Policy shares an issue brief on value-based payment and skilled nursing facilities.
- Community Catalyst and UMass Boston write a report detailing what family caregivers say they need based on several listening sessions.
- Global Health Care hosts a National Health Equity Summit, featuring a panel on eradicating ageism with JAHF's Terry Fulmer.
- *Health Affairs* publishes three papers as part of its Age-Friendly Health Series.
- Five states—IA, LA, MD, MA and NJ—participate in the eight-month State Program of All-Inclusive Care for the Elderly Action Network.
- The RAND Corporation releases findings from its initial evaluation of the Weinberg Center for Elder Justice Shelter Model for Elder Abuse and Mistreatment.



06 \(\phi\) June



- JAHF presents Donald M. Berwick with The 2021 John A. Hartford Foundation Trustees Award.
- The Hospital at Home Users Group kicks off a webinar series for hospital and system leaders interested in learning about opportunities and challenges associated with a CMS waiver supporting Acute Hospital Care at Home.
- The Better Care Playbook posts a blog by JAHF's Jane Carmody on public health's role in vaccinating people who are homebound.
- The JAHF Board of Trustees approves six grants, totaling more than \$5.8M.
- The American College of Physicians' *ACP Internist* publishes an article about Patient Priorities Care, a decision-making approach for older adults with multiple chronic conditions.
- The Institute for Healthcare Improvement shares a blog post about a safety net hospital's expansion of the Age-Friendly Health Systems 4Ms framework to meet the food security needs of patients.
- Health Affairs Forefront publishes an article exploring the role of family caregivers in Hospital At Home programs, co-authored by JAHF's Rani Snyder.



- The National Academies of Sciences, Engineering, and Medicine shares a report detailing an agenda for the next 10 years of dementia research.
- CVS Health publishes an article and infographic discussing its commitment to age-friendly care, supported by Case Western Reserve University School of Nursing.
- USAging (formerly n4a) awards The John A. Hartford Foundation 2021 Business Innovation Award to Hebrew SeniorLife for its Right Care, Right Place, Right Time program.
- Trust for American's Health posts a blog exploring the connections between family caregivers and public health.
- *Medical Care* publishes a commentary by JAHF's Amy Berman on addressing shortcomings in care transitions.
- Trust for America's Health recognizes the NY State Department of Health as the first state health department to complete the 10 action steps for Age-Friendly Public Health Systems recognition.
- The CATCH-ON Geriatric Workforce Enhancement Program at Rush University releases videos for older adults and family caregivers about the 4Ms of agefriendly care.
- Second Wave Michigan shares an article on the state's plan to pursue "agefriendly everything."





- JAHF's Nancy Wexler authors a blog on what we have learned about persondriven outcome measures.
- The American Academy of Home Care Medicine unveils an online directory connecting patients and their families with local home health providers.
- The American Journal of Health Promotion publishes an editorial co-authored by JAHF's Scott Bane on ways employers and states can better support family caregivers.
- The Health and Aging Policy Fellows program announces a new class of fellows.
- AARP produces a series of how-to videos and resources for family caregivers on what to expect before, during and after a hospital stay.
- The American Geriatrics Society releases virtual educational modules with the American Medical Association on how surgical and related medical subspecialists can best care for older adults.
- The Aging and Disability Business Institute provides a toolkit to help organizations communicate clearly and effectively.

September



- The National Academy of Medicine announces the recipients of the 2021 Healthy Longevity Catalyst Awards.
- The Administration for Community Living releases the RAISE Family Caregiving Advisory Council's initial report, including recommendations on how the government and businesses can better support family caregivers.
- The Department of Veterans Affairs launches its Geriatric Emergency Department Initiative for older veterans.
- The JAHF Board of Trustees approves two grants totaling \$3.6 million.
- The U.S. HHS Office of Disease Prevention and Health Promotion hosts the 2021 Healthy Aging Symposium and reports on a yearlong series of regional workshops featuring the Age-Friendly Health Systems and Age-Friendly Public Health Systems initiatives.
- The Convergence Center for Policy Resolution issues a framing paper on reimagining care for older adults in nursing homes and the range of settings they call home.

10 October



- The American Academy of Nursing recognizes JAHF's Terry Fulmer and Jane Carmody for their contributions to the field of nursing.
- The Center to Advance Palliative Care announces the winners of the JAHF Tipping Point Challenge.
- The Gerontological Society of America selects 17 fellows for its Journalists in Aging Fellows Program.
- The Massachusetts Coalition for Serious Illness Care shares research finding collaboration between clinicians, patients and families is key to improving serious illness care and health equity.
- Kaiser Health News and JAHF host a webinar about confronting ageism.
- The Administration for Community Living introduces the caregivers featured in the RAISE Act initial Report to Congress.
- *JAMA Network* publishes an article and podcast episode featuring JAHF's Terry Fulmer discussing nursing home innovations.
- A *Journal of the American Geriatrics Society* paper finds the Geriatric Surgery Verification program reduces postoperative lengths of stay.
- ADvancing States announces seven states to receive technical assistance in using federal COVID-19 relief funds to strengthen home and communitybased services.
- The Better Care Playbook posts a collection of resources focusing on homeand community-based palliative care.



November



- The National Alliance for Caregiving releases an analysis on incentivizing medical providers to include caregivers as part of an older adult's care team.
- The *Journal of the American Geriatrics Society* publishes an article coauthored by JAHF's Terry Fulmer and Marcus Escobedo examining clinician knowledge and behaviors related to the Age-Friendly Health Systems initiative 4Ms framework.
- The Hospital at Home Users Group creates a technical assistance center.
- The Diverse Elders Coalition, in partnership with the National Alliance for Caregiving and JAHF, hosts a congressional briefing on addressing the needs of diverse family caregivers.
- The National Academy for State Health Policy offers guidance on financial and workplace security for family caregivers as part of their RAISE Act State Policy Roadmap for Family Caregivers.
- The Family Caregiver Alliance shares a series of blogs and infographics on dementia caregiving programs in the online repository Best Practice Caregiving.
- The CDC invites a taskforce of volunteers, convened by JAHF, to advise on ways to facilitate the disbursement of federal COVID-19 relief funds to nursing home and long-term care facilities.



12 December



- The Institute for Healthcare Improvement disseminates a guide for clinicians on how to effectively ask and act on what matters to older adults in their care.
- Route Fifty publishes an op-ed authored by JAHF's Rani E. Snyder discussing how states can support family caregivers.
- The JAHF Board of Trustees approves six grants totaling more than \$4.5 million.
- JAHF releases findings from its Age-Friendly Insights poll showing widespread public support for transforming nursing home care.
- The Home Centered Care Institute debuts a video on rethinking modern medicine and home-based primary care.
- The UCLA Alzheimer's and Dementia Care Program creates training curricula for dementia care specialists in partnership with the Gerontological Advanced Practice Nurses Association.
- Next Avenue posts a special report on the future of elder care.





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