

2018 ANNUAL REPORT



The John A. Hartford Foundation
Dedicated to Improving the Care of Older Adults



Older adults deserve
the best care possible.

Working together,
it's happening.

2018 Annual Report



The John A. Hartford Foundation

Dedicated to Improving the Care of Older Adults

The John A. Hartford Foundation
www.johnahartford.org

The John A. Hartford Foundation
strives to do the greatest good
for the greatest number by
supporting efforts to improve
the care of older adults.





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President and Board Chair's Message

Collaboration means *working together* to create something powerful and meaningful.

It's what drives us at The John A. Hartford Foundation. We work closely with our Board of Trustees, grantees, health systems, and partners, both inside and outside the field of aging, because older adults deserve the best care possible.

Our three Priority Areas—*Age-Friendly Health Systems*, *Family Caregiving*, and *Serious Illness and End of Life*—taken together provide a comprehensive blueprint for improving care for older adults.

In 2018, we worked together to improve the care of older adults in many important ways:

- We attracted 125 teams from more than 75 health systems to be part of our growing Age-Friendly Health Systems initiative. Together with leading innovators in health care including the Institute for Healthcare Improvement, the American Hospital Association and the Catholic Health Association of the United States, we've created a dynamic virtual learning community grounded in the evidence-based 4Ms Framework.
- We sparked new innovative partnerships in aging and health. Our support of a multidisciplinary group of experts convened by the American Bar Association Commission on Law and Aging and the American Academy of Hospice and Palliative Medicine resulted in *Advance Directives: Counseling Guide for Lawyers*, a new resource to help attorneys draft clear advance directives that will be readily understood, easily available, and acted upon by their clients' clinicians.
- We identified and spread critical best practices in family caregiving and advanced related policy. Along with the Milbank Memorial Fund, the May and Stanley Smith Charitable Trust, and the Gordon and Betty Moore Foundation, we launched *Helping States Support Families Caring for an Aging America*, a six-state initiative led by the Center for Health Care Strategies to reshape practice and policy to better support family caregivers of older adults.

As we reflect on the past year, we want to recognize the tremendous contributions of Charles A. Dana and Lile R. Gibbons, who retired from our Board of Trustees in 2018. We are indebted to them for their insight and leadership. We thank our Trustees for their commitment, our staff for their expert work, and our many grantees and partners for moving our work forward in exciting and impactful ways.

We look forward to 2019 and continuing our collaborative efforts to make extraordinary progress advancing our mission to improve the care of older adults.

Sincerely,



Terry Fulmer, PhD, RN, FAAN — *President*



Margaret L. Wolff — *Chair of the Board*



Trustees and Staff Working Together

Our success relies upon working together, and that spirit of collaboration starts with our own Trustees and staff. We are motivated by the philosophy of our founders John and George Hartford, who believed, “It is necessary to carve from the whole vast spectrum of human needs one small band that the heart and mind together tell you is the area in which you can make your best contribution.”

Striving for the impact envisioned by our founders, our Trustees and staff work hand-in-hand to advance our mission. Together, we study new and promising approaches to care, explore opportunities for future investment, conduct site visits to understand our impact, and—most importantly—we inspire each other.

The John A. Hartford Foundation Trustees Award

To honor colleagues who inspire us, in 2018 we created The John A. Hartford Foundation Trustees Award, presented to John R. Burton, MD, for his extraordinary lifetime dedication to improving care for older adults.

Dr. Burton, a renowned grantee, transformed clinical care by developing innovative models, spreading geriatrics expertise to surgical and related specialties, mentoring scores of clinical trainees, and helping develop a top-tier geriatrics program.

The Trustees and staff celebrate Dr. Burton’s inspiring decades of achievement.

Dr. John R. Burton receives The John A. Hartford Foundation Trustees Award in June 2018.





Working Together: 2018 Highlights



**Age-Friendly
Health Systems**



Family Caregiving



**Serious Illness and
End-of-Life Care**

We achieved major impact by working together in 2018. Spreading evidence-based models of age-friendly care across health systems, improving state caregiving policies and programs, and providing new resources for better serious illness care are just some of the highlights. None of this would have been possible without the thoughtful collaboration of Trustees, staff, grantees, policymakers, and others who share our commitment to transforming care for all of us as we age.



WORKING TOGETHER TO SPREAD AGE-FRIENDLY HEALTH SYSTEMS

Age-Friendly Health Systems Initiative

OPPORTUNITY

Working with the Institute for Healthcare Improvement, the American Hospital Association, Catholic Health Association of the United States, and five pioneering health systems, we successfully prototyped the “4Ms” Framework for age-friendly care—What Matters, Medication, Mentation, and Mobility. We set a bold goal to spread 4Ms evidence-based best practices to 20 percent of U.S. hospitals and health systems by 2020.

APPROACH

In 2018, we launched the first Age-Friendly Health Systems Action Community. The seven-month virtual learning experience allows teams from any health care setting—such as the emergency department (ED), a hospital unit, primary care clinic, or skilled nursing facility—to receive coaching and tools for improving care. The teams generously share data and learnings with each other.

IMPACT

More than 125 teams from over 75 health systems enthusiastically joined the first Action Community. We’ve seen rapid results:

- Systems are asking their older patients What Matters and integrating that into the electronic health record so that goals of care are followed.
- Simple changes, such as switching water containers at the hospital bedside, are helping older adults drink more fluids to reduce the risk of delirium and Mentation problems.
- Mobility plans are in place and Medications are being de-prescribed, resulting in decreased length of hospital stay.

The second Action Community launches in 2019 and another 150 teams have already signed on.

Age-Friendly 
Health Systems



WORKING TOGETHER TO SPREAD AGE-FRIENDLY HEALTH SYSTEMS

Hospital at Home®

OPPORTUNITY

Most people want to avoid hospitalization whenever possible. Not only is it inconvenient and frightening to be admitted, but it is risky given the hazards associated with hospitalization.

APPROACH

Hospital at Home® provides hospital-level care in a patient's home as a safe and cost-effective substitute for acute hospital care. We augmented a federal award to deliver and evaluate a version of Hospital at Home developed by the Icahn School of Medicine at Mount Sinai, which bundles hospital-at-home care with a 30-day period of home-based transitional care. Working together we are setting the program up for a Medicare payment model so that more people can get this care.

IMPACT

Results of the evaluation, published in JAMA Internal Medicine in August 2018, were promising. Compared with patients receiving inpatient care, those receiving hospital-at-home care had:

- Shorter length of stay
- Lower rates of 30-day hospital readmission, emergency department visits, and skilled nursing facility admissions
- Better ratings of care



**Icahn
School of
Medicine at
Mount
Sinai**



WORKING TOGETHER TO SPREAD AGE-FRIENDLY HEALTH SYSTEMS

Geriatric ED Initiatives

OPPORTUNITY

Americans aged 65 and older enter emergency departments (EDs) at higher rates than those who are younger, and will make up an increasing share of ED visits in the years to come. Assessing and improving the delivery of care at this common entry point into our health care system will result in less harm, better outcomes, and more satisfied patients.

APPROACH

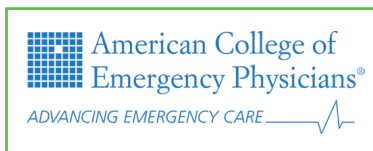
In partnership with the West Health Institute, we launched the Geriatric Emergency Department Collaborative (GEDC) to evaluate best practices, transform care, and spread learnings about how to provide the best emergency care to older adults. It coordinates nine EDs, four national organizations, and interdisciplinary faculty who study geriatric ED interventions, provide online curriculum, and help train EDs.

In 2018, the American College of Emergency Physicians established the Geriatric Emergency Department Accreditation (GEDA) program, which provides standards and guidance for EDs and indicates to the public that the accredited institution is focused on providing high standards of quality care.

IMPACT

As of December 31, 2018, 25 institutions were already accredited.

Findings from a study of GEDC sites participating in a prior federal program were published in March 2018. As written about in JAMA Forum, older adults seen by a nurse who coordinates the transition from ED to home were less likely to be admitted to the hospital than those who did not.





WORKING TOGETHER TO SUPPORT FAMILY CAREGIVERS

UCLA Alzheimer's and Dementia Care (ADC) Program

OPPORTUNITY

Alzheimer's disease affects an estimated 5.8 million people in the United States, and these people have twice as many hospital stays compared to others their age. In 2017, 16 million family members and friends provided 18 billion hours of unpaid care for people with dementia. Many of these caregivers receive little preparation, training, or support. Often, they are not aware of resources that are available to them.

APPROACH

UCLA's Alzheimer's and Dementia Care Program uses expertly trained nurse practitioners (NPs) as Dementia Care Specialists. These NPs work with the primary care team, provide clinical services, and share in-depth guidance about community-based social, environmental, and financial services that can ease the burden for both patients and their caregivers. In 2018, we began to develop resources, partnerships, and a strategy for spreading and scaling the program. Starting in 2019, we plan to implement the program in up to 10 sites.

IMPACT

According to a study in Alzheimer's and Dementia:

- Participating patients had fewer depressive and behavioral symptoms than peers.
- Caregivers reported fewer depressive symptoms, less distress related to the patients' behavior, lower strain, and an increased sense of self-efficacy.

A JAMA Internal Medicine study published in December 2018 also shows the program is cost effective.

UCLA Health





WORKING TOGETHER TO SUPPORT FAMILY CAREGIVERS

Helping States Support Families Caring for an Aging America

OPPORTUNITY

Most states are not fully prepared to meet the needs of older adults, despite being the primary funders of long-term services and supports. Family caregivers can, and should, be part of the solution. Nearly 18 million family members and friends provide care to older people, often preventing nursing home placement and re-hospitalizations.

APPROACH

Given the need for a clear roadmap to better state caregiving policies, in 2018 we launched Helping States Support Families Caring for an Aging America, an initiative led by the Center for Health Care Strategies.

Together with our funding partners, the Milbank Memorial Fund, the May & Stanley Smith Charitable Trust, and the Gordon and Betty Moore Foundation, we are working with governors, state agency leaders, and policymakers to develop and implement strategies that better support caregivers.

IMPACT

Six states—Alabama, Idaho, Iowa, New Hampshire, South Carolina, and Virginia—joined the initiative and committed to learning from each other and experts in family caregiver support. We are already gaining valuable insights. The Center for Health Care Strategies identified four areas of need that can be addressed, even amid state budget constraints and competing priorities.

CHCS
Center for Health
Care Strategies, Inc.



WORKING TOGETHER TO IMPROVE SERIOUS ILLNESS & END-OF-LIFE CARE **National Academy for State Health Policy**

OPPORTUNITY

Palliative care allows people to live well in the face of serious illness—from diagnosis to cure, and even at the end of life. It can reduce costs, especially for people with complex health needs: a 2016 study of home-based palliative care found that it generated a 4.2 to 6.6 percent return on investment, largely by reducing unnecessary hospitalizations. States are uniquely positioned to promote access to palliative care through their roles as regulators, payers, and innovators of health care.

APPROACH

We launched a multi-year initiative with the National Academy for State Health Policy (NASHP), to develop critical palliative care resources for policymakers.

IMPACT

In 2018, NASHP released a comprehensive review of how all 50 states are supporting the delivery of palliative care to adults, and what they are doing to improve palliative care access and quality using multiple policy levers. The analysis, including state-by-state palliative care regulations and Medicaid activities, provides a powerful tool to spread better serious illness care.





WORKING TOGETHER TO IMPROVE SERIOUS ILLNESS & END-OF-LIFE CARE

Next Avenue Special Report on Serious Illness & End of Life

OPPORTUNITY

Next Avenue, a PBS-affiliated national journalism service for Americans aged 50 and older, is extremely influential: an astounding 95 percent of readers take an action after reading *Next Avenue* stories.

APPROACH

Realizing the potential of *Next Avenue*'s activated audience, we sponsored a special report in 2018 to help *Next Avenue* readers better understand end-of-life choices, care, and conversations.

IMPACT

Our “Living to the End of Life” Series:

- Featured 26 stories, including essays from Terry Fulmer, on a variety of topics
- Published a video that generated more than 3,500 views on Facebook
- Engaged veterans around unique end-of-life care issues through PBS' Facebook and Twitter accounts on Veterans Day
- Secured 5.1 million impressions across all editorial coverage and social media

Another special series focused on “Strengthening Rural Health Care for Older Adults.”

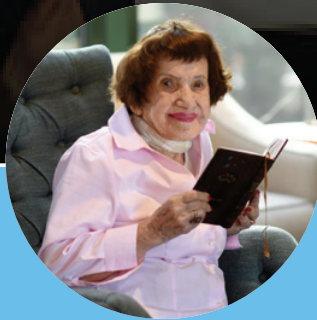




About Us



Grants



Financials



Leadership & Staff

Our success relies upon working with others. Whether strategizing with grantees, developing resources to inform policy and practice, engaging champions across our networks, or helping spread and scale innovative models of care, we are allied in efforts to transform care for older adults.





2018 Grants

Grants Awarded in 2018

We funded a robust roster of 16 new grants totaling \$16.8 million to improve the care of older adults. The Foundation made \$20.3 million in payments to existing grants in 2018.

First Quarter 2018

Twin Cities Public Television	\$700,000
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Television Documentary Production and Distribution: "Fast Forward"

William F. Baker, PhD

Trust for America's Health	\$409,378
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Advancing an Age-Friendly Public Health System

John Auerbach

Center for Health Care Strategies	\$279,000
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Helping States Support Families Caring for an Aging America

Michelle Herman Soper

Second Quarter 2018

American Geriatrics Society and American College of Emergency Physicians	\$2,158,209
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Catalyzing Emergency Department Enhancements for Older Adults

Kevin Biese, MD, and Ula Hwang, MD





2018 Grants

Second Quarter 2018 (continued)

Center for Medicare Advocacy	\$615,000
<i>Medicare Education & Outreach: Opening Doors to Quality Care for Older Adults with Long-term and Serious Illnesses</i>	
Judith Stein, JD	

National Academy for State Health Policy	\$449,509
<i>Supporting the Continuum of Palliative Care: A Resource Hub for State Policymakers</i>	
Kitty Purington, JD	

Third Quarter 2018

Yale University	\$3,000,000
<i>Patient Priorities Care: Dissemination and Scaling</i>	
Mary Tinetti, MD.	

Research Foundation for Mental Hygiene, Inc.	\$2,399,822
<i>Health and Aging Policy Fellows Program</i>	
Harold Alan Pincus, MD	

Case Western Reserve University	\$945,684
<i>Age-Friendly Health Systems Ambulatory Care Continuum</i>	
Mary A. Dolansky, PhD, RN, FAAN	

Diverse Elders Coalition	\$549,679
<i>Addressing Unmet Family Caregiving Needs in Diverse Older Communities: Planning Grant</i>	
Jenna McDavid	





2018 Grants

Fourth Quarter 2018

Icahn School of Medicine at Mount Sinai <i>Scaling and Dissemination of Hospital at Home</i> Albert Siu, MD.	\$2,000,000
Education Development Center, Inc. <i>National Collaboratory to Address Elder Mistreatment, Model Implementation</i> Rebecca Stoeckle	\$1,550,000
University of California, Los Angeles <i>Dissemination of the UCLA Alzheimer's and Dementia Care Program</i> David Reuben, MD	\$1,512,085
Institute for Healthcare Improvement <i>Complex Care Learning Collaborative for Medicare Advantage Plans</i> Kedar Mate, MD	\$120,636
Institute for Healthcare Improvement <i>Continued Development of the Better Care Playbook, Phase 4</i> Kedar Mate, MD	\$95,184

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.

The Foundation makes grants by invitation only. Please visit www.johnahartford.org for more information.

To view all our annual reports, please visit: www.johnahartford.org/about/annual-reports



Summary of Active Grants

		Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
AGING & HEALTH					
AGE-FRIENDLY HEALTH SYSTEMS					
American Academy of Home Care Medicine	Chicago, IL	86,271		86,271	0
<i>Building Awareness and Engaging Payers to Bring Home-Based Primary Care into the Mainstream</i>					
Mindy J. Fain, MD					
American College of Surgeons	Chicago, IL	1,537,978		619,042	918,936
<i>Geriatric Surgery Verification and Quality Improvement Program</i>					
Clifford Y. Ko, MD, MS, MSHS					
American Geriatrics Society, Inc.	New York, NY	1,161,617		589,048	572,569
<i>Geriatrics Workforce Enhancement Program (GWEP) Coordinating Center</i>					
Nancy E. Lundebjerg, MPA					
American Geriatrics Society, Inc.	New York, NY	950,449		456,591	493,858
<i>Geriatric Orthopedic Hip-Fracture Co-management Implementation</i>					
Nancy E. Lundebjerg, MPA					
American Geriatrics Society, Inc.	New York, NY	498,070	1,276,481	1,024,300	750,251
<i>Catalyzing Emergency Department Enhancements for Older Adults: Geriatric Emergency Department Collaborative (GEDC 2.0), Phase 2</i>					
Nancy E. Lundebjerg, MPA, Kevin Biese, MD, Ula Hwang, MD					
Case Western Reserve University	Cleveland, OH		945,684	845,684	100,000
<i>Age-Friendly Health Systems Ambulatory Care Continuum</i>					
Mary Dolansky, PhD, RN, FAAN					
Center for Medicare Advocacy	Mansfield, CT	125,000		125,000	0
<i>Reducing Harm to Medicare Beneficiaries: Improving Hospital Observation Status and Other Policies</i>					
Judith Stein, JD					
Center for Medicare Advocacy	Mansfield, CT		615,000	307,500	307,500
<i>Medicare Education & Outreach: Opening Doors to Quality Care for Older Adults with Long-term and Serious Illnesses</i>					
Judith Stein, JD					
Community Catalyst, Inc.	Boston, MA	268,953		268,953	0
<i>Voices for Better Health: Geriatrics Provider Collaboration Renewal</i>					
Reneé Marcus Hodin, JD					
Education Development Center, Inc.	Waltham, MA	518,260	1,550,000	1,181,804	886,456
<i>National Collaboratory to Address Elder Mistreatment</i>					
Rebecca Stoeckle					



Summary of Active Grants

		Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
AGE-FRIENDLY HEALTH SYSTEMS					
Emergency Medicine Foundation dba American College of Emergency Physicians <i>Catalyzing Emergency Department Enhancements for Older Adults: Geriatric Emergency Department Accreditation (GEDA)</i> Sandra Schneider, MD, FACEP	Irving, TX		881,730	356,719	525,011
Home Centered Care Institute <i>National Home Care Medicine Education & Expansion Initiative</i> Thomas Cornwell, MD	Schaumburg, IL	247,145		156,758	90,387
Icahn School of Medicine at Mount Sinai <i>Implementation of Rehabilitation at Home Scaling and Dissemination of Hospital at Home</i> Albert L. Siu, MD, MSPH	New York, NY	783,977	200,000	1,051,416	1,732,561
Institute for Healthcare Improvement <i>Age-Friendly Health Systems</i> Kedar Mate, MD	Cambridge, MA	1,709,932		464,855	1,245,077
Institute for Healthcare Improvement <i>Continued Development of the Better Care Playbook</i> Kedar Mate, MD	Cambridge, MA	43,455	95,184	43,495	95,184
Institute for Healthcare Improvement <i>Complex Care Learning Collaborative for Medicare Advantage Plans</i> Kedar Mate, MD	Cambridge, MA		120,636	0	120,636
Johns Hopkins University <i>Implementation of a National Learning Collaborative to Enhance the Quality of Home-Based Primary Care</i> Bruce A. Leff, MD	Baltimore, MD	687,219		270,363	416,856
National Association of Area Agencies on Aging, Inc. <i>Building the Capacity of the Aging and Disability Networks to Ensure the Delivery of Quality Integrated Care</i> Sandy Markwood, MA	Washington, DC	993,840		815,955	177,885
National Committee for Quality Assurance <i>Demonstration of Person-Driven Outcome Measures for an Age-Friendly Health System</i> Jessica Briefer French, MHSA	Washington, DC	1,128,027		133,465	994,562
National PACE Association <i>PACE 2.0: Adapting and Disseminating PACE to Serve High-Need, High-Cost Populations</i> Peter Fitzgerald, MSc	Alexandria, VA	180,225		180,225	0



Summary of Active Grants

		Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
AGE-FRIENDLY HEALTH SYSTEMS					
President and Fellows of Harvard College <i>Understanding Information Continuity and its Impact on Care for Older Adults</i> Ashish K. Jha, MD, MPH	Cambridge, MA	507,600		507,600	0
Regents of the University of Minnesota <i>Increasing Interprofessional Collaboration (IPC) in Clinical Nursing & Health Professions Education</i> Barbara F. Brandt, PhD	Minneapolis, MN	149,858		149,858	0
Research Foundation for Mental Hygiene <i>Health and Aging Policy Fellows Program</i> Harold Alan Pincus, MD	Menands, NY	1,078,919	2,399,822	508,942	2,969,799
Trust for America's Health <i>Advancing an Age-Friendly Public Health System</i> John Auerbach	Washington, DC		409,378	224,398	184,980
Yale University <i>Patient Priorities Care: Dissemination and Scaling</i> Mary E. Tinetti, MD	New Haven, CT	905,228	3,000,000	1,260,675	2,644,553
Total Age-Friendly Health Systems		\$13,562,023	\$13,293,915	\$11,628,917	\$15,227,061
SERIOUS ILLNESS & END OF LIFE					
Center for Health Policy Development National Academy for State Health Policy <i>Supporting the Continuum of Palliative Care: A Resource Hub for State Policymakers</i> Kitty Purington, JD	Washington, DC		449,509	217,317	232,192
Icahn School of Medicine at Mount Sinai <i>The Center to Advance Palliative Care (CAPC): Transformation Business Plan</i> Diane E. Meier, MD	New York, NY	604,016		400,000	204,016
National Academy of Sciences dba National Academies of Sciences, Engineering & Medicine <i>Roundtable on Quality of Care for People with Advanced Illness</i> Sharyl Nass	Washington, DC	70,487		35,244	35,243
New York University <i>Nurses Improving Care for Healthsystem Elders in Long-Term Care (NICHE-LTC)</i> Eileen M. Sullivan-Marx, PhD, RN	New York, NY	963,585		963,585	0



Summary of Active Grants

		Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
SERIOUS ILLNESS & END OF LIFE					
Twin Cities Public Television <i>Television Documentary Production and Distribution: "Fast Forward"</i> William F. Baker, PhD	Saint Paul, MN		700,000	632,245	67,755
University of Washington <i>CareLab: Building a Collective Strategy to Accelerate Progress in End-of-Life Care</i> Anthony Back, MD	Seattle, WA	1,023,730		1,023,730	0
Total Serious Illness & End of Life		\$4,317,120	\$226,997	\$1,882,299	\$2,661,818
FAMILY CAREGIVING					
AARP Foundation <i>Supporting Family Caregivers Providing Complex Care: Bridging the Gap between Expectations and Execution</i> Susan C. Reinhard, PhD, RN	Washington, DC	872,705		491,187	381,518
Benjamin Rose Institute <i>Online Resource for Comparing Evidence-Based Dementia Caregiving Programs</i> David M. Bass, PhD	Cleveland, OH	302,648		91,215	211,433
Center for Health Care Strategies <i>Helping States Support Families Caring for an Aging America</i> Stephen A. Somers	Hamilton, NJ		279,000	173,609	105,391
Diverse Elders Coalition Fiscal Sponsor: Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. (SAGE) <i>Addressing Unmet Family Caregiving Needs in Diverse Older Communities: Planning Grant</i> Jenna McDavid	New York, NY		549,679	549,679	0
Regents of the University of California <i>Dissemination of the UCLA Alzheimer's and Dementia Care Program</i> David B. Reuben, MD	Los Angeles, CA		1,512,085	0	1,512,085
Total Family Caregiving		\$13,562,023	\$13,293,915	\$11,628,917	\$15,227,061



Summary of Active Grants

		Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
COMMUNICATIONS & SPECIAL INITIATIVES					
Grantmakers in Aging <i>Reframing Aging: Phase II</i> John A. Feather, PhD	Arlington, VA	105,575		105,575	0
Grantmakers in Aging <i>Core Support Renewal</i> John A. Feather, PhD	Arlington, VA	160,766		39,994	120,772
Henry J. Kaiser Family Foundation <i>Kaiser Health News: The Late Life and Geriatric Care Reporting Project</i> David Rousseau, MPH	Menlo Park, CA	1,426,153		799,070	627,083
Project HOPE - The People-to-People <i>Health Foundation, Inc.</i> <i>Health Affairs: Publishing and Disseminating Lessons on Innovative Health Care Models for an Aging Population Renewal</i> Alan Weil, JD, MPP	Bethesda, MD	258,970		0	258,970
Tides Center <i>Eldercare Workforce Alliance Renewal</i> Amy M. York	San Francisco, CA	100,000		0	100,000
Total Communications & Special Initiatives		\$2,051,464	\$0	\$994,639	\$1,106,825
SOCIAL INNOVATION FUND					
University of Washington <i>Social Innovation Fund: Healthy Futures IMPACT Expansion Renewal</i> Jürgen Unützer, MD, MPH, MA	Seattle, WA	62,136		62,136	0
Total Social Innovation Fund		\$62,136	\$0	\$62,136	\$0
LEGACY GRANTS					
American Federation for Aging Research, Inc. <i>Paul B. Beeson Career Development Awards in Aging Research Partnership Renewal</i> Odette van der Willik	New York, NY	1,236,146		162,683	1,073,463
American Geriatrics Society, Inc. <i>Geriatrics for Specialists Initiative (GSI): Phase V</i> John R. Burton, MD	New York, NY	367,010		182,322	184,688



Summary of Active Grants

		Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
LEGACY GRANTS					
Regents of the University of Colorado <i>Practice Change Leaders for Aging and Health Renewal</i> Eric A. Coleman, MD, MPH	Denver, CO	1,266,100		1,266,100	0
Wake Forest University Health Sciences <i>Integrating Geriatrics into the Specialties of Internal Medicine Renewal: Capitalizing on Forward Momentum</i> Kevin P. High, MD, MSc	Winston-Salem, NC	200,537		98,045	102,492
Total Legacy Grants		\$3,069,793	\$0	\$1,709,150	\$1,360,643
TOTAL AGING & HEALTH		\$22,582,587	\$16,784,188	\$18,922,653	\$20,444,162
PRESIDENT'S DISCRETIONARY FUND					
Partnership Fund					
American Academy of Home Care Medicine <i>Bronze Level Support for the 2018 Annual Meeting</i> \$2,500 Mindy J. Fain, MD	Chicago, IL		2,500	2,500	
American College of Preventive Medicine <i>Healthy Aging Summit 2018</i> \$5,000 Denise M. Brasse	Washington, DC		5,000	5,000	
Brandeis University <i>Council on Health Care Economics and Policy, 2018 Princeton Conference</i> \$20,000 Jehuda Reinharz	Waltham, MA		20,000	20,000	
Gerontological Society of America <i>2018 Annual Scientific Meeting</i> \$25,000 James C. Appleby, BSPharm, MPH	Washington, DC		25,000	25,000	
Grantmakers in Aging <i>Sponsorship for the 2018 Annual Conference opening reception</i> \$15,000 John A. Feather, PhD	Arlington, VA		15,000	15,000	
Health Research and Educational Trust <i>Health Forum Trust Award</i> \$1,500 Barbara Birkhead	Chicago, IL		1,500	1,500	



Summary of Active Grants

	Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
PRESIDENT'S DISCRETIONARY FUND				
Hebrew Home for the Aged at Riverdale Foundation, Inc. 101 Annual Gala \$15,000 Daniel A. Reingold, MSW, JD	Riverdale, NY	15,000	15,000	
Institute for Healthcare Improvement 2018 National Forum on Quality Improvement in Health Care \$15,000 David Coletta	Boston, MA	15,000	15,000	
Lown Institute, Inc. 2018 Lown Institute Conference \$2,500 Shannon Brownlee	Brookline, MA	2,500	2,500	
Medicare Rights Center, Inc. Annual Awards Dinner \$1,000 Joe Baker	New York, NY	1,000	1,000	
National Academy of Sciences 2018 National Academies of Sciences, Engineering, and Medicine Forum on Aging, Disability, and Independence \$25,000 Harvey V. Fineberg, MD, PhD	Washington, DC	25,000	25,000	
National Academy of Social Insurance Support for The Robert M. Ball Award 2018 \$1,500 Kristine Quinio	Washington, DC	1,500	1,500	
New York Academy of Medicine 2018 Annual Gala \$12,500 Judith A. Salerno, MD, MS	New York, NY	12,500	12,500	
New York Academy of Medicine NYAM's 171th Anniversary Discourse & Awards and Annual Meeting of the Voting Fellows \$1,000 Judith A. Salerno, MD, MS	New York, NY	1,000	1,000	
New York University Rory Meyers College of Nursing Nurses Improving Care for Healthsystem Elders (NICHE) Silver Sponsorship \$10,000 Michal-Lynn Gramby	New York, NY	10,000	10,000	



Summary of Active Grants

	Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
PRESIDENT'S DISCRETIONARY FUND				
Primary Care Development Corporation New York, NY 25th Anniversary Gala Support \$1,000 Louise Cohen, MPH		1,000	1,000	
Santa Fe Group, Inc. New York, NY 2019 Salon, "Comprehensive Health without Oral Health: The Medicare Paradox" \$10,000 Michael C. Alfano		10,000	10,000	
Trustees of the University of Pennsylvania Philadelphia, PA 2019 Snowbird Health Peri-Summit Sponsorship \$5,000 Vivian Williams		5,000	5,000	
United Hospital Fund of New York New York, NY 2018 Gala Sponsor \$800 Michelle Levy-Branower		800	800	
Total Partnership Fund	\$0	\$169,300	\$169,300	\$0
Program Development				
Trustees of Columbia University in the City of New York New York, NY Identifying Drivers of State-based Differences in the Status of Older Persons in the US \$78,000 John W. Rowe, MD		39,000	39,000	
Institute for Healthcare Improvement Boston, MA Age-Friendly Health Systems - Health System- Specific Financial Tools and Business Cases \$28,941 Tam Duong		28,941	28,941	
Massachusetts Institute of Technology Cambridge, MA Mapping the Possible Futures of Technology & Caregiving \$150,000 Joseph F. Coughlin, PhD		150,000	150,000	
National Academy of Sciences New York, NY Global Roadmap for Healthy Longevity Initiative \$50,000 Elizabeth M. Finkelman, MPP		50,000	50,000	
Total Program Development	\$0	\$267,941	\$267,941	\$0



Summary of Active Grants

	Balance Due January 1, 2018	Grants Authorized During Year	Amount Paid During Year	Balance Due December 31, 2018
PRESIDENT'S DISCRETIONARY FUND				
Memberships/Other				
AcademyHealth <i>Annual Support</i> \$2,000 Sandy McNeil	Washington, DC	2,000	2,000	
The Foundation Center <i>Annual Support</i> \$11,000 Bradford K. Smith, MA	New York, NY	11,000	11,000	
Grantmakers in Aging <i>Annual Support</i> \$7,500 John A. Feather, PhD	Arlington, VA	7,500	7,500	
Grantmakers in Health <i>Annual Support</i> \$14,950 Faith Mitchell, PhD	Washington, DC	14,950	14,950	
Hispanics in Philanthropy <i>Annual Membership</i> \$5,000 Anamarie Argilago	Oakland, CA	5,000	5,000	
Philanthropy New York, Inc. <i>Annual Support</i> \$17,350 Ronna D. Brown, JD	New York, NY	17,350	17,350	
Services & Advocacy for Gay Lesbian Bisexual & Transgender Elders, Inc. <i>Annual Support</i> \$5,000 Michael Adams, JD, MA	New York, NY	5,000	5,000	
Total Membership/Other	\$0	\$62,800	\$62,800	\$0
TOTAL PRESIDENT'S DISCRETIONARY FUND	\$0	\$500,041	\$500,041	\$0
<i>Matching Grants¹</i>		\$834,592	\$834,592	
<i>Discretionary Grants²</i>		56,000	56,000	
<i>JAHF Trustee Award</i>		20,000	20,000	
<i>Grants Refunded or Cancelled</i>	\$46,924	(106,417)	(59,473)	
<i>Discounts to Present Value</i>	(530,638)	(\$431,637)		(\$962,275)
<i>Total (All Grants)</i>	\$22,118,873	\$17,636,767	\$20,253,813	\$19,481,887

¹Grants made under the Foundation's program for matching charitable contributions by Trustees and staff.

²Grants made under the Foundation's program for charitable contributions designated by staff.





Financials

FINANCIAL SUMMARY

The Foundation's investment portfolio ended in 2018 at approximately \$536 million. Disbursement for grants, administrative expenses, and taxes totaled \$28 million during the year. This represented a net-of-fee return on the investments of negative 4.2 percent, which was mainly driven by the global equity market sell-off in the fourth quarter of 2018. Although 2018 marked the portfolio's worst annual performance since the financial crisis in 2008, we are gratified that the portfolio value has increased by \$112 million after all spending since the prior bear market ended in March 2009.

The Foundation's investment objective continues to be securing maximum long-term total return on its investment portfolio in order to maintain a strong grants program, while assuring consistent growth of its assets at a level greater than the rate of inflation. We are pleased that the Foundation was able to preserve and enhance the real value of its endowment over the past 31 years; the portfolio delivered an 8.2 percent return per annum, while spending over \$957 million in today's dollars for grants and expenses during this period of time.

With the assistance of Goldman Sachs, the Foundation's investment advisor since August 2012, the Foundation has proactively redesigned and maintained a moderate risk portfolio diversified across a wide array of asset classes and strategies. The Foundation made several adjustments to its long-term target allocations as well as rebalanced its portfolio throughout 2018. Specifically, a new strategic asset category (private debt) was added and exposure to hedge funds was increased, while the tactical tilts asset class was eliminated. In comparison to its strategic targets, the portfolio was slightly overweight across all liquid asset classes mainly due to the continued underweight position in private investments. At year-end 2018, the Foundation's asset mix was 52 percent long-only equities, 21 percent fixed-income, 3 percent cash, 15 percent hedge funds, and a total of 9 percent in private funds. In comparison, at the end of 2017, the Foundation's portfolio was comprised of 51 percent long-only equities, 17 percent fixed-income, 2 percent cash, 13 percent hedge funds, 8 percent tactical tilts, and a total of 9 percent in private equity and real estate funds.



Financials

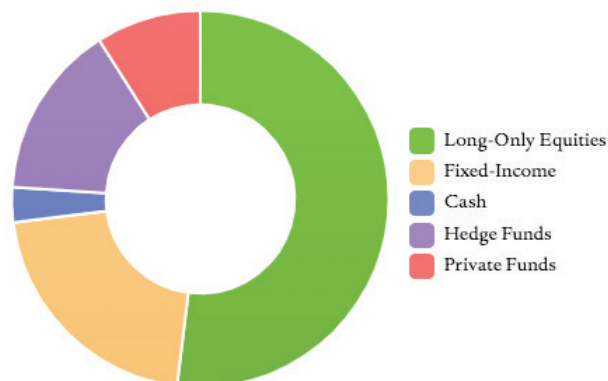
FINANCIAL SUMMARY (CONTINUED)

Intense market volatility throughout the year, driven by fading global growth expectations and mounting geopolitical tensions, contributed to a tumultuous year for global equities and eroded double-digit gains made in 2017. However, the portfolio benefited from prudent diversification during the year; positive performance achieved by investment-grade fixed income, cash, and private investments helped offset the significant losses from the public equity holdings. Heading into 2019, as the global economy is now approaching the later stages of expansion, we are confident that our disciplined, prudent investment approach will provide us with the ability to navigate an unpredictable political and economic landscape while capitalizing on investment opportunities.

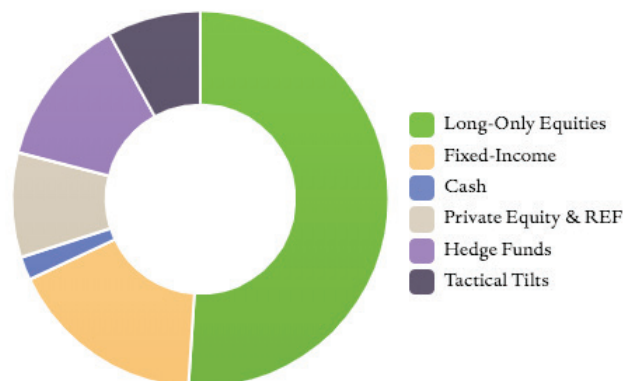
The Finance Committee and the Board of Trustees meet regularly with Goldman Sachs to review asset allocation, investment strategy and the performance of the underlying investments. Northern Trust Corporation is the custodian for all the Foundation's securities. A complete listing of investments is available 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 June.

Eva Cheng
Vice President, Finance

2018 Asset Mix



2017 Asset Mix





Leadership & Staff

Our Trustees

Margaret L. Wolff
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Co-Vice Chair

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Charles M. Farkas

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President

Mark Barreiro
Senior Grants Officer

Jane Carmody
Program Officer

Kevin De La Cruz
Administrative Assistant

Rutuma Gandhi
Accounting Manager

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Marcus Escobedo
*Senior Program Officer &
Communications Director*

Mary Jane Koren
Program Consultant

Jennifer Phillips
Executive Assistant

Rani E. Snyder
Vice President, Program

Amy Berman
Senior Program Officer

Clare Churchouse
Communications Associate


Melida Galvez
Senior Accountant

Julianne McLean
Program Secretary



2018 Milestones

In 2018 we worked together to launch new programs, grow investments, expand networks, and provide valuable resources to improve care for older adults.



One Hundred Fifteenth Congress of the United States of America

AT THE SECOND SESSION
Begun and held at the City of Washington on Wednesday,
the third day of January, two thousand and eighteen

An Act

To provide for the establishment and maintenance of a Family Caregiving Strategy, and for other purposes.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,
SECTION 1. SHORT TITLE.



KHN
KAISER HEALTH NEWS

NAVIGATING AGING:
LIVING WELL WITH DEMENTIA

JANUARY

- The John A. Hartford Foundation (JAHF) introduces three new grant initiatives, authorized in December 2017.
- Mark Barreiro joins the Foundation as a new Senior Grants Officer.
- Amy Berman, Senior Program Officer, presents patient-centered care models and recommendations at Grand Rounds for the Centers for Medicare & Medicaid Services.
- The *RAISE Family Caregivers Act* is signed into law.
- *Next Avenue* launches JAHF-supported series, *Strengthening Rural Health Care for Older Adults*.
- Center for Medicare Advocacy releases self-help toolkit for older adults to advocate for coverage of skilled nursing facility care.

FEBRUARY

- *Health Affairs Blog* features the Foundation's support of partnerships between community-based organizations and health care.
- American College of Surgeons publishes "*Hospital Standards to Promote Optimal Surgical Care of the Older Adult*."
- *Kaiser Health News* presents expert panel discussion on improving care and services for people with dementia and supporting their family caregivers.
- *The Journal of the American Geriatrics Society* publishes findings showing reductions in risk of unnecessary hospitalization from Geriatric Emergency Department interventions.



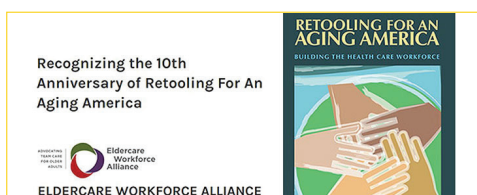
2018 Milestones

MARCH

- The Foundation announces three new grants totaling nearly \$1.4 million.
- American Geriatrics Society releases *CoCare: Ortho* training resources for health system implementation of hip fracture co-management.
- American Society on Aging cites the Foundation's development of an online resource for evidence-based dementia caregiving programs.
- Terry Fulmer, President, publishes "Prescriptions for the Hospitals of the Future" about the Hospital at Home® model in a *Wall Street Journal* letter to the editor.

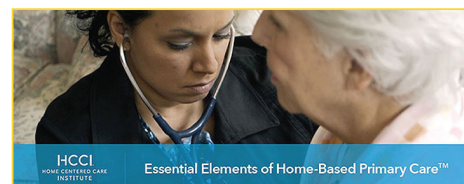
APRIL

- Eldercare Workforce Alliance launches campaign marking 10-year anniversary of *Retooling for an Aging America* report.
- Terry Fulmer, President, and Bruce Chernof, President and CEO, The SCAN Foundation, co-edit *The Fifth Edition of The Handbook of Geriatric Assessment*.
- *Trust for America's Health Report* focuses on how public health can contribute to an age-friendly society.
- The Better Care Playbook launches a map of complex care innovations across the country that can be filtered by population, care program elements, states, and more.
- *New England Journal of Medicine (NEJM) Catalyst* publishes "*Hospital at Home®-Plus Reduces Days Spent in Hospitals and Other Inpatient Facilities.*"



MAY

- American College of Emergency Physicians introduces new *Geriatric Emergency Department Accreditation program*.
- *Resources for Integrated Care* webinar addresses supporting older adults with substance use disorders.
- Home Centered Care Institute announces training sessions on essential elements of *Home-Based Primary Care*.
- American Hospital Association releases "*Creating Age-Friendly Health Systems*" issue brief, which provides snapshots of how five pioneering health systems are prototyping the age-friendly model of care.

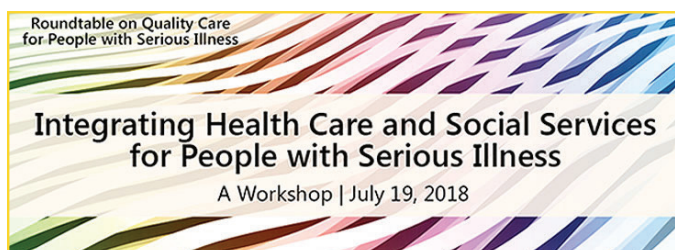


JUNE

- John R. Burton receives *The John A. Hartford Foundation Trustees Award*.
- The Foundation announces three new grants totaling \$3.2 million.
- The Age-Friendly Health Systems initiative invites health systems to join first seven-month Action Community; more than 120 teams join.
- National Committee for Quality Assurance (NCQA) announces new demonstration project to measure person-driven outcomes.
- *NBC Nightly News* features the JAHF-supported "*Hospital At Home®*" initiative.
- *Stanford Social Innovation Review* publishes "*Reframing Aging: Growing 'Old at Heart,'*" co-authored by Terry Fulmer, President.



2018 Milestones



JULY

- Health Affairs publishes findings from JAHF-funded Research on the effects of electronic health records on care improvements and patient mortality.
- Catholic Health Association publishes article by Michigan Age-Friendly Health Systems participants on encouraging greater mobility for older adults.
- The National Academies of Sciences, Engineering, and Medicine conducts first JAHF-supported Roundtable on Quality Care for People with Serious Illness workshop.
- Marcus Escobedo, Sr. Program Officer and Communications Director, co-authors introduction to special issue of *Clinics in Geriatric Medicine* on emergency department care of older adults.
- n4a announces winners of *The John A. Hartford Foundation's 2018 Business Innovation Award*, recognizing community-based organizations partnering with health systems to improve care for older adults.
- *Next Avenue* introduces JAHF-supported series, *Living to the End of Life*.
- Terry Fulmer, President, provides the closing keynote address at the 2018 *Healthy Aging Summit* co-sponsored by the U.S. Dept. of Health and Human Services.
- Anne Arundel Medical Center, participants in the Age-Friendly Health Systems initiative, publish *NEJM Catalyst* article, "Measuring Patient Quality of Life: Time is What Matters."

AUGUST

- JAHF President Terry Fulmer, in the first installment of the *What We're Learning* series, updates the field on the Foundation's efforts to bring age-friendly care to 20 percent of U.S. hospitals and health systems by 2020.
- n4a releases *Crosswalk of the Age-Friendly Health Systems "4Ms"* for community-based social service organizations.
- The Center for Consumer Engagement in Health Innovation announces "Speak Up for Better Health Award" recipients, recognizing older adults and caregivers who are improving the health of their communities.
- Programs of All-Inclusive Care for the Elderly (PACE®) releases new video series illustrating the need for expanding PACE through the stories of participants.

SEPTEMBER

- The Foundation announces four new grants totaling nearly \$7 million.
- Scott Bane joins the Foundation as a Program Officer.
- *Kaiser Health News* hosts expert panel discussion on medical overtreatment.
- American Geriatrics Society CoCare: Ortho program releases new video featuring Northwell Health's adoption of the hip fracture co-management model.
- The JAMA Forum features *Geriatric ED Accreditation program of the American College of Emergency Physicians*.
- Center for Medicare Advocacy begins series of webinars on Medicare-related topics.
- American Board of Medical Specialties and American Geriatrics Society release *Virtual Patient Cases* to provide best practices in surgical care for older adults.
- The Better Care Playbook features blog by Terry Fulmer, President, on "PACE 2.0: A Prime Opportunity for Delivery Systems and Payers."



2018 Milestones

ADVANCE DIRECTIVES: COUNSELING GUIDE FOR LAWYERS

Commission on Law and Aging
American Bar Association



OCTOBER

- American Bar Association releases *Advance Directives: Counseling Guide for Lawyers* with the American Academy of Hospice and Palliative Medicine and other partners.
- New York Academy of Medicine honors Rani E. Snyder, Program Director, and Mary Jane Koren, Program Consultant.
- Amy Berman, Senior Program Officer, gives the keynote address at the Patient-Centered Outcomes Research Institute's annual meeting.
- Patient Priorities Care publishes multiple papers on the development and implementation of its approach to aligning care with older patients' health priorities.
- The National Consensus Project for Quality Palliative Care releases updated *Clinical Practice Guidelines for Quality Palliative Care*, with JAHF support for evidence review.



HBPC RESOURCES
A TOOLKIT FOR HEALTH PARTNERS

NOVEMBER

- PBS' NPT Reports features JAHF's Age-Friendly Health Systems and the Coalition for Quality in Geriatric Surgery projects.
- Six states join *Center for Health Care Strategies* initiative to advance policies for supporting family caregivers of older adults.

- American Academy of Home Care Medicine releases digital toolkit of home-based primary care educational resources for payers.
- Health Resources and Services Administration announces Geriatrics Workforce Enhancement Program Funding Opportunity including Age-Friendly Health Systems principles.

DECEMBER

How ACOs Are Caring for People with Complex Needs

Kristen A. Peck, Benjamin Usadi, Alexander Mainor,
Helen Newton, and Ellen Meara



- The Foundation announces five new grants totaling more than \$5.2 million to implement and disseminate evidence-based approaches to better care for older adults.
- National Academy for State Health Policy releases report on its 50-state scan of promising policy approaches for states to enhance palliative care.
- The University of Washington AIMS Center publishes its evaluation report for the federal Social Innovation Fund project to implement collaborative care depression treatment program in the rural northwest.
- A six-foundation collaborative committed to improving care for people with complex needs releases report from The Dartmouth Institute for Health Policy and Clinical Practice on "*How Accountable Care Organizations (ACOs) are Caring for People with Complex Needs.*"
- JAMA Internal Medicine publishes outcomes in health care utilization and cost from the UCLA Alzheimer's and Dementia Care program.





The John A. Hartford Foundation
Dedicated to Improving the Care of Older Adults