

TUFTS Health Plan

2010 COMMUNITY BENEFITS ANNUAL REPORT
as submitted to the
MASSACHUSETTS OFFICE OF THE ATTORNEY GENERAL
May 31, 2011

I. TUFTS ASSOCIATED HEALTH MAINTENANCE ORGANIZATION (TAHMO) COMMUNITY BENEFITS MISSION STATEMENT

Tufts Health Plan is committed to promoting the health and wellness of vulnerable populations in our communities. We do so every day through our ongoing activities and the hard work of our devoted staff. We also meet this commitment through the dedicated resources of the Tufts Health Plan Foundation, which currently focuses on serving older adults through programs and education promoting healthy aging.

II. TUFTS HEALTH PLAN FOUNDATION OVERVIEW

A.) Mission Statement and Background

To better support the communities we serve, TAHMO launched the Tufts Health Plan Foundation in 2007. The foundation's mission is to promote healthy lifestyles and the delivery of quality health care in our communities. The foundation's focus is *Healthy Aging - improving the lives of older adults age 60 and over*. Through the programs funded, the foundation hopes to elevate the well-being of older adults so as to enable them to live healthier lives. The foundation funds more than \$2 million annually in grants to more than 60 Massachusetts and Rhode Island organizations.

B.) Grant Programs

To address the health care needs of our communities and help meet the challenges of an aging society, the Tufts Health Plan Foundation is committed to funding healthy aging programs for older adults ages 60 and over. Through the programs funded, the foundation hopes to elevate the physical, mental, and emotional well-being of older adults; enable them to contribute their experiences and knowledge to their communities; and ultimately help them live healthier lives. The foundation makes grants in four program areas as follows:

Vibrant Lifestyles- Living vibrantly is the cornerstone of healthy aging. The Tufts Health Plan Foundation seeks to support programs and initiatives that lead to the following beneficial outcomes for older adults:

- Better physical health (i.e. increased strength, mobility, endurance, and better nutrition);
- Improved cognitive and mental health;
- Increased social, civic, and/or community engagement;
- Decreased isolation and depression;

- Prevention, delay or better management of chronic illnesses; and, ultimately,
- A higher quality of and satisfaction with life.

Intergenerational Collaboration- Intergenerational collaborations enrich the health and well-being of both older adults and young people. While many benefits accrue to younger people involved in intergenerational collaborations, the Tufts Health Plan Foundation is interested supporting collaborations that focus on the following benefits for older adults:

- The creation of meaningful relationships with young people;
- A stronger link to and greater involvement in their communities;
- Decreased social isolation and depression;
- Improved cognitive fitness;
- Transfer of experience, knowledge and skills, and acquisition of new knowledge and skills;
- Improved life satisfaction, and/or
- Improved health outcomes.

Fall Prevention- According to the Massachusetts Medical Society, falls are the No.1 cause of injury among older adults in Massachusetts, and the Centers for Disease Control (CDC) has reported that among older adults, falls are the leading cause of injury deaths. Our funding in Fall Prevention supports programs that prevent injury from falls.

Eligible programs in the area of fall prevention will be expected to demonstrate their contribution to one or more of these desired outcomes:

- Increased strength and balance;
- Reduction of fear of falls;
- Greater mobility in and outside of home;
- Fewer falls, hip fractures, head injuries, other injuries, fall-related hospitalizations, and/or fall-related deaths.

Caregiver Support- As the number of older adults being cared for by family members and other informal caregivers increases, greater education and support is needed to improve care and promote mutually beneficial relationships between caregivers and older care recipients. We seek to fund programs that provide support for family and other informal caregivers.

Eligible programs in the area of caregiver support will be expected to demonstrate their contribution to one or more of these desired outcomes for family and other informal caregivers and older care recipients:

- Greater awareness of caregiver resources;
- Greater knowledge of how to care for an older adult (safe transfers and lifts, special needs of older adults, nutrition, etc.);
- Increased support from other caregivers and decreased caregiver isolation;
- Improved emotional and physical well-being for caregivers;

- Increase in time spent by older care recipients living comfortably and safely in a home or community setting; and ultimately,
- Better physical and emotional health for older care recipients.

C.) Key Accomplishments in 2010

The Tufts Health Plan Foundation continued with its strategic focus area of healthy aging for older adults ages 60 and over, awarding over \$2 million in grants to organizations in Massachusetts. The foundation continued to focus on healthy aging within four program areas of *Vibrant Lifestyles, Intergenerational Collaboration, Fall Prevention, and Caregiver Support*.

The foundation also continued its work with Brandeis University's Massachusetts Health Policy Forum to engage the community in a broad policy and educational effort to develop a statewide initiative to make Massachusetts a model for healthy aging. A conference free to the public was held in September 2010, announcing plans to build a grassroots planning effort and engage government, academic and policy experts, providers, and community organizations in the process.

In an effort to build capacity for a chosen nonprofit organization in the area of healthy aging, the foundation sponsored a Social Issue Track entitled *Healthy Aging: Pathways to Lifelong Wellness* with Root Cause's Social Innovation Forum. The overall objective of this program was to enhance organizational capacity through business plan development, as well as improved program evaluation and marketing strategies. Generations Incorporated was the chosen innovator for this track.

The foundation also implemented a new evaluation tool in order to better measure the impact of its grants. The tool measures impact of programs on three levels of change: learning, action and condition. A condition change represents an ultimate improvement in health status.

In addition, the foundation:

- Continued a two-year matching grant from the Partners Investing in Nursing's Future – a partnership between the Robert Wood Johnson Foundation and Northwest Health Foundation – to expand efforts to address the nursing workforce shortage among multiple stakeholders in Massachusetts, New Hampshire, and Rhode Island;
- Matched donations made by Tufts Health Plan employees during its Workplace Giving campaign. The monies were shared among Community Health Charities of New England, Community Works, and United Way of Massachusetts Bay and Merrimack Valley, and;
- Supported earthquake relief in Haiti by contributing to Partners in Health: Stand with Haiti through a donation and an employee match campaign.

D.) Plans for Next Reporting Year

The foundation plans to continue its strategic focus on healthy aging programs for older adults in 2011 with more than \$2 million in grants.

III. COMMUNITY BENEFITS PROCESS

A.) Community Benefits Leadership/Team

In 2010, Tufts Health Plan carried out its community benefits plan through the Tufts Health Plan Foundation. The foundation is governed by a Board of Directors including community representation as well as the Tufts Health Plan CEO and three TAHMO board members. In 2010, the foundation staff included an executive director (who is a Tufts Health Plan vice president), a director of grants, health policy analyst/program associate and program coordinator. In addition, an Internal Review Committee, made up of 13 Tufts Health Plan employees, evaluated all grant proposals. Approved grants were then passed on to the foundation's board of directors for final approval.

2010 Tufts Health Plan Foundation Board:

Thomas P. O'Neill III (Chairman)
Chief Executive Officer, O'Neill & Associates

James Roosevelt Jr.
President and Chief Executive Officer, Tufts Health Plan

John Baackes
Chief Executive Officer, Senior Whole Health

David S. Green, M.D., Concord Pulmonologist and Emerson Hospital staff
(Also serves on TAHMO Board of Directors)

Jackie L. Jenkins-Scott
President, Wheelock College
(Also serves on TAHMO Board of Directors)

Vincent Mor, Ph.D.
Professor and Chair, Department of Community Health, Brown University

George A. Russell Jr.
Executive Vice President, Director of Corporate Citizenship
and President of State Street Foundation, Inc., State Street Corporation

Barbara Shattuck Kohn
Principal, Shattuck Hammond Partners, Inc.

Steven A. Tolman
Senator, 2nd Suffolk & Middlesex District

Rev. Liz Walker
Executive Producer, Better Living With Liz Walker, WCVB-TV Channel 5

2010 Tufts Health Plan Foundation Staff:

David Abelman, Vice President, Deputy General Counsel and Foundation Executive Director

Anne Marie Boursiquot, Director of Grants

Abby Driscoll, Health Policy Analyst and Program Associate

Sarah Leib, Program Coordinator (January-August)

Kristyn McCandless, Program Coordinator (October-December)

2010 Tufts Health Plan Foundation Internal Review Committee (consisting of Tufts Health Plan employees per below):

Patty Blake
Senior Vice President of Senior Products

Tom Croswell
Chief Operating Officer

Tony Dodek
Medical Director, Pediatrics and Pharmacy

Patti Embry-Tautenhan
Vice President for Communications

Mike Gustin
Purchasing Manager

Tom Kelley
Director of Finance

Denise Kress
Director of Care Management

Rebecca Levanduski
Director of Marketing

Jessica Lynch
Project Coordinator

Josephine Riddick
Assistant Manager

Kajal Sen Gupta
Human Resources Manager

David Webster
Director Medicare Preferred Contracting

B.) Publication of Community Benefits Programs Information

Information on the foundation's grant programs, application processes and previously awarded grants is readily available on its website at <http://www.tuftshealthplanfoundation.org>.

In addition, the foundation and Tufts Health Plan publish annual reports providing the community with information on all community benefits programming. Emails are sent throughout the year to foundation contacts announcing grant due dates and providing information on program areas. All awarded grants are announced publicly twice a year through press announcements and communicated to all Tufts Health Plan employees through periodic intranet articles. In December, the foundation's executive director provided a company-wide report of the foundation's activities, which was published on the intranet. The foundation executive director and board chair provide reports on the foundation's activities to the TAHMO Board of Directors.

C.) Community Benefits Team Meetings

The foundation has two grant cycles per year. In 2010, the first cycle of grants were awarded in July and the second in December. For each cycle, there was an initial Letter of Inquiry (LOI) review process conducted by the foundation staff. Selected organizations were then invited back to submit a full proposal. Full proposals were reviewed by the foundation staff. Proposals that were approved by the staff were then reviewed by the Internal Review Committee (IRC.) Each grant was reviewed by two reviewers, and then all grants were discussed and, if approved, moved forward by the IRC at the IRC Review Meeting. The Foundation Board of Directors met five times in 2010. At the June and October board meetings, the full docket of grants proposed for funding was reviewed by the board, with grants over \$25,000 being subject to board approval.

In addition to the regular grant review process, the foundation staff met on a frequent basis to further the mission of the foundation and implement its grant programs and strategic initiatives.

D.) Community Partners

In 2010 the foundation worked with the Massachusetts Health Policy Forum at Brandeis University to continue to build a statewide healthy aging initiative. Through this process, a Healthy Aging Steering Committee was formed with community, policy, government

and academic leaders from the following organizations (see also <http://masshealthpolicyforum.brandeis.edu/forums/Healthy%20Aging.html>):

AARP Massachusetts

Action for Boston Community Development Elder Services

Brandeis University, Heller School for Social Policy and Management

Central Massachusetts Agency on Aging

Greater Boston Interfaith Organization

Health Care For All

Health Foundation of Central Massachusetts

Hebrew SeniorLife

Massachusetts Association of Councils on Aging

Massachusetts Association of Older Americans

Massachusetts Executive Office of Elder Affairs

Massachusetts Department of Public Health

Massachusetts Health Policy Forum at Brandeis University

Massachusetts Public Health Association

Massachusetts Senior Action Council

Office of Representative Alice Wolf, Massachusetts State House

Office of Senator Patricia Jehlen, Massachusetts State Senate

The Healthy Aging Steering Committee then developed three subcommittees with leadership from the following organizations and participation from over fifty (50) community representatives sitting on the subcommittees:

AARP Massachusetts

Action for Boston Community Development Elder Services

Brandeis University Heller School of Social Policy and Management

Elder Services of the Merrimack Valley

Massachusetts Association of Councils on Aging

Massachusetts Association of Older Americans

E.) Community Health Needs Assessment

In 2008 and 2009, the foundation undertook a strategic planning process, including a needs assessment. The needs assessment included academic and policy research, analysis of public health data, and interviews with representatives from academic, government, community service, health policy, health care provider and consumer advocacy organizations. Over 20 health care issues were analyzed based on their incidence in Massachusetts, effect on vulnerable populations, policy implications and availability of government and other funding. This process led to the foundation's strategic focus on healthy aging for older adults age 60 and over beginning in 2009. The foundation aims to improve the health and wellness of older adults with the four following program areas: Vibrant Lifestyles, Intergenerational Collaboration, Fall Prevention and Caregiver Support.

Consultant: TCC Group

Representatives from the leadership of the following organizations were interviewed:

Action for Boston Community Development Elder Services

Brandeis University Heller School for Social Policy and Management

Community Partnership for Older Adults

Grantmakers in Aging

Harvard School of Public Health

Massachusetts Department of Public Health

Massachusetts Executive Office of Elder Affairs

Massachusetts Association of Older Americans

MetroWest Community Foundation

Office of the Honorable Edward M. Kennedy

Partners Community HealthCare, Inc.

The Dimock Center

Tufts Health Care Institute (THCI)

William F. Connell School of Nursing at Boston College

Representatives from the leadership of the following organizations participated in a focus group meeting regarding healthy aging programs:

Action for Boston Community Development Elder Services

Central Mass Agency on Aging

Ethos

Hearth Inc.

Massachusetts Association of Older Americans

Massachusetts Department of Public Health

Massachusetts Executive Office of Elder Affairs

IV. COMMUNITY BENEFITS PLAN

Based on the needs assessment conducted in 2008-2009, TAHMO developed a community benefits plan for 2010. In 2010, Tufts Health Plan carried out its community benefits plan through the Tufts Health Plan Foundation, with a mission to promote healthy lifestyles and the delivery of quality care in our communities. The foundation had four grant program areas focused on improving health and wellness for older adults: Vibrant Lifestyles, Intergenerational Collaboration, Fall Prevention, and Caregiver Support.

V. COMMUNITY BENEFITS PROGRAMS

In 2010, the Tufts Health Plan Foundation awarded more than \$2 million in grants to organizations in Massachusetts with a focus on healthy aging for older adults ages 60 and over. The foundation continued to focus on healthy aging within four program areas of *Vibrant Lifestyles, Intergenerational Collaboration, Fall Prevention, and Caregiver Support*. The Vibrant Lifestyles program area can be divided into four sub-categories encompassing different strategies, including: health promotion, evidence-based programs, civic engagement and case management. Two additional community benefits programs in 2010 included a capacity building initiative with the Social Innovation Forum as well as a strategic initiative on healthy aging in partnership with Brandeis University's Massachusetts Health Policy Forum. A detailed list of the foundation's 2010 community benefits programs is provided in the Community Benefits Report Summary.

VI. STRATEGIC INITIATIVE: MASSACHUSETTS AS A MODEL FOR HEALTHY AGING

In 2009, the Tufts Health Plan Foundation launched an initiative focused on healthy aging for older adults 60 and over. Leveraging that grant making initiative, the foundation and the Massachusetts Health Policy Forum partnered to develop policy and public education approaches aimed at building a healthy aging movement in Massachusetts.

In December 2009, a conference was held in Boston with more than 300 attendees including policy experts, government officials, academic leaders, advocates and representatives of community based organizations that work with older adults. The conference, *Healthy Aging in the Commonwealth: Pathways to Lifelong Wellness*, included speakers from the Massachusetts Executive Office of Elder Affairs, Department of Public Health, Commonwealth Care Alliance, Hebrew SeniorLife and a keynote address by Nancy Whitelaw from the National Council on Aging. An issue brief on healthy aging authored by Walter Leutz at Brandeis University was released, outlining the essential components of healthy aging as well as policy and program approaches statewide and nationally.

Since the conference, the Tufts Health Plan Foundation and Massachusetts Health Policy Forum have furthered their work by bringing together key experts and leaders from government, academia, the provider community and grassroots organizations that work with older adults to form a Healthy Aging Steering Committee. This committee met several times throughout the year, focused on laying out the key elements of an action plan for a broad state initiative on healthy aging.

In September 2010 a second conference was held to announce a plan for moving forward with three subcommittees in the areas of healthy aging communities, healthy aging programs and public awareness. The subcommittees will formulate action plans, which the steering committee will then incorporate into an overall plan to make Massachusetts a national model for healthy aging. We expect to launch the plan in late 2011.

More information on the Healthy Aging Steering Committee, subcommittees, as well as all conference publications can be found at <http://masshealthpolicyforum.brandeis.edu/forums/Healthy%20Aging.html>

VII. COMMUNITY SERVICE PROGRAMS

While TAHMO's community benefits mission is mainly carried out by the Tufts Health Plan Foundation through healthy aging program grants, TAHMO also supports the community with community service programs through its Community Relations Department.

In 2010, through its community relations funding, Tufts Health Plan contributed more than \$750,000 to 110 organizations, including grants as well as corporate sponsorships.

Examples of the breadth of organizations that benefited from Tufts Health Plan's efforts to improve the health of the community include:

- Alzheimer's Association
- American Heart Association
- Arthritis Foundation
- Beth Israel Deaconess Medical Center
- Catholic Charities
- Fallon Clinic Foundation
- Greater Boston Interfaith Organization
- Health Care for All
- The Schwartz Center for Compassionate Healthcare
- Longwood Symphony Orchestra
- March of Dimes
- Mount Auburn Hospital
- National Braille Press
- New England Baptist Hospital
- Tufts Health Care Institute
- Tufts University School of Medicine
- Visiting Nurse Association of Boston
- Whittier Street Health Center

In addition, Tufts Health Plan employees contributed 1,430 volunteer hours, totaling \$47,925, to worthwhile projects, such as the following:

- Hosted a blood drive for Mount Auburn Hospital and a blood drive Children's Hospital Boston
- Collected more than 1,500 pounds of food for the Watertown Food Pantry
- provided much needed school supplies and holiday gifts for The Salvation Army in Cambridge
- Completed repair projects at the family-focused Newton Community Service Center
- Worked with Charles River Conservancy in beautifying the banks of the Charles River
- Removed debris, sanded and painted portions of the wrought iron fence of The Old Burying Place, the historic graveyard adjacent to our building in Watertown.

Tufts Health Plan employees generously raised and donated more than \$37,600 to assist a variety of nonprofit organizations such as:

- American Cancer Society
- Community Health Charities of New England
- Community Works
- United Way of Massachusetts Bay and Merrimack Valley

VIII. TUFTS HEALTH CARE INSTITUTE

Tufts Health Care Institute (THCI) is a not-for-profit 501(c)3 supporting organization established jointly by Tufts Associated Health Maintenance Organization (TAHMO) and Tufts University School of Medicine in 1995.

The mission of the institute is to help physicians and other health care professionals — at all stages of their training and development — to practice comfortably and effectively in a complex and evolving health care environment. In support of this mission, the institute develops, implements, evaluates and disseminates educational programs and activities that promote the practice of high quality, cost-effective, evidence-based care. THCI's ultimate aim is to improve patient care and health outcomes through education.

THCI's educational programs and activities focus primarily in the areas of:

- Quality and performance improvement
- Evidence-based practice
- Communication and teamwork
- Care management and systems-based practice
- The organization and financing of health care

In 2010, the institute conducted ten live and 18 online educational programs focused on the above-listed activities. 560 physicians and other health care professionals attended the live programs. THCI's online modules were viewed more than 3,000 times, by health care professionals at more than 30 organizations across the country, approximately 20% of whom were from Massachusetts. All THCI programs are relevant to the care of vulnerable populations. Of particular interest in this regard may be THCI's online modules on Health Literacy, Cultural Competence and Professionalism.

The institute's educational programs are open to all interested health professionals, not just those within the Tufts community.

IX. Contact Information

Abby Driscoll
Program and Health Policy Officer
Tufts Health Plan Foundation
705 Mt. Auburn St.
Watertown, MA 02472-1508
www.tuftshealthplanfoundation.org
(617) 972-9016 direct
(617) 972-9048 fax
abby_driscoll@tufts-health.com