



# Welcome!

Welcome to San Francisco and to the Grantmakers In Health (GIH) 2013 Annual Meeting on Health Philanthropy. Inspired by the meeting theme, *Big Ideas to Blueprints: Decisive Grantmaking in Dynamic Times*, we are offering a wealth of opportunities for grantmakers to learn, share ideas, and have fun.

Among the things you won't want to miss are plenary speeches by:

- **Nicole Lurie**, Assistant Secretary for Preparedness and Response, U.S. Department of Health and Human Services;
- **Rebecca Onie**, Cofounder and CEO, Health Leads; and
- **Jeanette Betancourt**, Senior Vice President, Outreach and Educational Practices, Sesame Workshop.

Other can't miss opportunities are:

- the Terrance Keenan Award Luncheon on Thursday, March 14, honoring **Dr. James Kimmey**, former president and CEO of the Missouri Foundation for Health;
- receptions on Wednesday and Thursday evenings, as well as a special Newcomers' Welcome on Wednesday afternoon for first-time meeting attendees; and
- issue network breakfast meetings on Thursday morning.

Elaborating on the meeting theme and illustrating big ideas in action in a variety of settings are the GIH essay and guest commentaries by **Diana Bontá**, President and CEO, The California Wellness Foundation; **Ned Calonge**, President and CEO of The Colorado Trust; **Kerry Diaz**, President, Quantum Foundation; **Patricia Doykos**, Director, Bristol-Myers Squibb Foundation; **Robert Hughes**, President and CEO, Missouri Foundation for Health; and **Russell Johnson**, President and CEO, North Penn Community Health Foundation.

The challenges grantmakers face grow more complex each day. Foundation leadership is changing as the first cohort of conversion foundation CEOs retires, poverty and inequality are worsening, and the implementation of the Affordable Care Act begins. *Big Ideas to Blueprints: Decisive Grantmaking in Dynamic Times* reflects GIH's perspective that in times of change and uncertainty, it is doubly important to be thoughtful, strategic, and unafraid. Big ideas and big thinking are essential elements of the grantmaking toolkit that, once translated into workable plans, can provide a way through choppy waters.

Thank you for attending. We hope that the meeting will be a source of both information and inspiration for you and your work.

## Acknowledgements

Since the last Annual Meeting on Health Philanthropy, Grantmakers In Health (GIH) has gone through a significant transition period, which we like to call GIH 3.0. It is an exciting time and a welcomed one as it gives us the chance to reflect on where we have been and to explore new ventures, big ideas, and where we'd like—and need—to go in order to progress and remain useful to the field.

Our own experience, in many ways, parallels the 2013 GIH annual meeting theme *Big Ideas to Blueprints: Decisive Grantmaking in Dynamic Times*, which delves into how funders can (and do) navigate shifting landscapes to achieve mission and meet community needs. This year's guest commentaries touch on different grantmaker experiences doing just that—making necessary adjustments while remaining true to core values that stand the test of time. Thank you to **Diana M. Bontá** of The California Wellness Foundation, **Ned Calonge** of The Colorado Trust, **Kerry A. Diaz** of Quantum Foundation, **Patricia Doykos** of Bristol-Myers Squibb Foundation, **Robert Hughes** of Missouri Foundation for Health, and **Russell Johnson** of North Penn Community Health Foundation for sharing their reflections.

We would also like to thank those who submitted session and site visit proposals, which represented a wide range of topics from health grantmakers across the country. Although we were unable to showcase all of them, we are grateful for the response from the field. We would especially like to thank the organizations that represent the accepted proposals: S.D. Bechtel, Jr. Foundation; The Bridgespan Group; The California Endowment; The California Wellness Foundation; Center for Care Innovations; The Colorado Health Foundation; Connecticut Health Foundation; Consumer Health Foundation; Funders Concerned About AIDS; The Health and Housing Funders' Forum; The Health Foundation of Greater Cincinnati; Health Care Foundation of Greater Kansas City; Hogg Foundation for Mental Health; Isaacs/Jellinek; Jewish Healthcare Foundation; Robert Wood Johnson Foundation; W.K. Kellogg Foundation; Maine Health Access Foundation; National Center for Creative Aging; The New York Community Trust; Quantum Foundation; REACH Healthcare Foundation; Samueli Foundation; The SCAN Foundation; and Washington Dental Service Foundation.

Our great appreciation goes to those who reviewed and evaluated all the session proposals submitted: **Jessica Hembree**, Health Care Foundation of Greater Kansas City; **Elizabeth Krause**, Connecticut Health Foundation; **Frank Lalle**, The California Wellness Foundation; **Jacqueline Martinez**, New York State Health Foundation; **Enrique Mata**, Paso del Norte Health Foundation; **René Seidel**, The SCAN Foundation; and **Richard Thomason**, Blue Shield of California Foundation.

Additionally, we want to thank *The Terrance Keenan Leadership Award in Health Philanthropy* selection committee for devoting considerable time to reviewing the nominees for the 2013 award. These committee members, drawn from GIH Funding Partners, are: **Jim Alexander**, The Otho S.A. Sprague Memorial Institute; **Yvonne Cook**, Highmark Foundation; **Meg Distler**, St. Joseph

Community Health Foundation; **Richard Figueroa**, The California Endowment; **Andy Hyman**, Robert Wood Johnson Foundation; **Velma Monteiro-Tribble**, Blue Cross and Blue Shield of Florida Foundation; and **Debbie Watson**, Winter Park Health Foundation. GIH board member **Tom David** chaired deliberations but did not vote on the award's outcome.

In 1982 GIH had 12 Funding Partners. Today, there are close to 250. Our success as a resource to grantmakers depends on your involvement. We are grateful to the funders, organizations, and individuals who have helped make the 2013 annual meeting possible. While the annual support of Funding Partners helps underwrite a portion of everything GIH does, including the annual meeting, we are particularly indebted to those Funding Partners who awarded GIH supplemental program grants, above and beyond their annual support, to help cover the meeting costs. Their additional generosity, which is instrumental in keeping registration fees affordable and the quality of the meeting high, merits special recognition. As we go to press, GIH Funding Partners contributing to the annual meeting include:

Archstone Foundation  
Blue Shield of California Foundation  
The California Endowment  
California HealthCare Foundation  
The California Wellness Foundation  
The Colorado Health Foundation  
George Family Foundation (*cosponsor – Wednesday Film Night*)  
Robert Wood Johnson Foundation  
The Henry J. Kaiser Family Foundation  
Kaiser Permanente (*cosponsor – Thursday Evening at The Ferry Building*)  
W.K. Kellogg Foundation  
The McKesson Foundation  
Metta Fund (*cosponsor – Welcome Reception*)  
Missouri Foundation for Health  
McKesson Foundation  
The Gordon and Betty Moore Foundation  
The David and Lucile Packard Foundation  
Fannie E. Rippel Foundation  
Samueli Foundation (*cosponsor – Wednesday Film Night*)  
Sierra Health Foundation

GIH would like to extend our appreciation to The California Endowment for the design and production of the "Health Happens Here at Grantmakers In Health" displays throughout the conference space.

Finally, we extend our thanks to the team at VRS Meetings and Events for their support in meeting planning and management.



# Navigating the Annual Meeting

As a courtesy to your colleagues, please silence the alerts on all cell phones, pagers, and other wireless devices while in meeting sessions.

Please display your conference badge at all meeting functions.

## REGISTRATION

Registration will be held in the Yerba Buena Grand Assembly – North Registration Area on the Yerba Buena lower B2 level as follows:

Wednesday, March 13	8:00 a.m. – 6:45 p.m.
Thursday, March 14	7:00 a.m. – 4:00 p.m.
Friday, March 15	7:00 a.m. – 1:00 p.m.

On-site registrations will be accepted, pending availability, at a cost of \$1,075.00 for Funding Partners and \$1,850.00 for non-Funding Partners.

## FINDING YOUR WAY AROUND THE SAN FRANCISCO MARRIOTT MARQUIS

The Marketplace and several breakout sessions will be held in the Atrium and Foothill rooms on the second level. Plenary sessions and other breakout sessions will be held in the Yerba Buena Ballroom on the lower B2 level. A hotel floor plan is included at the back of this section for your convenience.

## MARKETPLACE

Network and browse publications by grantmaking colleagues. In support of our efforts to be both fiscally and environmentally prudent, the majority of materials in the Marketplace will be display copies. Meeting attendees will receive a GIH USB drive and be able to download any of the marketplace materials at computer stations in the Marketplace area. Attendees can also contact the organizations directly to obtain hard copies.

The Marketplace is located in the Atrium on the second level and will be open during the following hours:

Wednesday, March 13	8:00 a.m. – 6:45 p.m.
Thursday, March 14	7:00 a.m. – 4:00 p.m.
Friday, March 15	7:00 a.m. – 1:00 p.m.

## HIGHLIGHTS OF THE ANNUAL MEETING

### Newcomers' Welcome

Back by popular demand, GIH will offer a get-together and orientation for newcomers to the annual

meeting on Wednesday, prior to the Opening Plenary session. Stop by the Club Room (second level) at 3:00 p.m. to learn about GIH, for practical tips on navigating the meeting, and to meet other first-time attendees.

### **Welcome Reception**

A welcome reception will be held from 5:15 to 7:00 p.m. in the Atrium (second level) immediately following Wednesday's Opening Plenary session. Come and mingle with friends and colleagues.

### **Film Night**

New to the annual meeting! On opening night, GIH will screen two award-winning and compelling films that examine health and health care in our country: *Escape Fire: The Fight to Rescue American Healthcare* and *Who Cares about Kelsey?* For further information on each film, please look under the **Wednesday, March 13** tab.

### **Get Fit With Your Colleagues**

GIH has arranged complimentary yoga sessions each morning. Join us for morning yoga at 6:30 a.m. on Thursday and Friday in Foothill B on the second level. Pre-registration for yoga is not required.

Join the Golden Gate National Parks Conservancy for an informative early morning amble on the iconic span on Thursday at 6:00 to 7:30 a.m. You'll be led on a stroll from the Plaza at the Golden Gate Bridge to the South Tower. Your Golden Gate Bridge expert will walk you through the incredible history and stories of the bridge while you experience one the world's most dramatic sidewalks. The bus will depart from the Mission Street Entrance, lobby level, promptly at 6:00 a.m. Please dress warmly with layers and wear appropriate running or walking shoes.

In addition, the GIH room rate includes unlimited use of the hotel fitness center located on the fourth floor of the hotel. The fitness center can be accessed 24 hours a day with a room key card.

### **Evening Reception at The Beaux Arts Ferry Building**

Please look for further details and directions under the **Thursday, March 14** tab. Buses will depart from the Mission Street Entrance, lobby level, beginning at 5:45 p.m. The last bus will return to the hotel from the Ferry Building at 8:30 p.m.

### **Site Visits**

Three site visits are offered on Friday afternoon, and two require a \$25 registration fee, which will be donated to the organization hosting the visit. **There are still a few seats available; please check the sign-up sheets at the GIH registration desk upon arrival.**

Site Visit 1: Designing, Building, and Maintaining Healthy Places (*registration fee*)

Site Visit 2: Expanding Access to Integrated Care through School-Based Health Centers  
(*registration fee*)

Site Visit 3: Healthy Parks, Healthy People at Crissy Field; Golden Gate Bridge Walk

Please plan to arrive in the lobby at 1:15 p.m. for a 1:30 p.m. departure from the Mission Street entrance, lobby level. For security reasons, please wear your badge and bring a photo ID with you.

## CONNECT WITH YOUR COLLEAGUES

### GIH Issue Networks

Issue Networks introduce you to people who share your interests, making it easier to share ideas and collaborate on projects. The following meetings are open to funders (see *Thursday, March 14* tab for more details). Ready to roll up your sleeves and dive into in-depth discussions and potential partnerships? Plan on attending one of these interactive working meetings:

- Behavioral Health Funders Network Breakfast
- Healthy Eating/Active Living (HEAL) Funders Network Breakfast
- Integrative Health Funders Network Breakfast
- Kids' Access Funders Network Breakfast
- National Alliance for Health Equity (NAHE) Funders Network Breakfast
- Oral Health Funders Network Breakfast
- Public Health Funders Network Breakfast

### Breakfast Roundtables

Friday morning's breakfast provides an excellent opportunity for you to network informally or to join a table around a common interest. Meeting participants are encouraged to form tables to discuss issues of mutual interest. Please sign up on the whiteboard at the meeting registration desk.

The roundtables will be held in Yerba Buena Ballroom Salons 7 on the lower B2 level of the hotel. A full breakfast buffet will be served. Take advantage of the opportunity to informally exchange valuable information and learn about the exciting work of your colleagues and fellow grantmakers.

## HELP US SERVE YOU BETTER

### Sign-in Process for Sessions

To help us track attendance and the interests of meeting participants, we request that attendees sign-in at each breakout session they attend. A sign-in sheet will be located in each breakout session room. This information will be used for internal GIH purposes only.

### Evaluation

Your comments and suggestions matter to us! Please help us improve the quality of the meeting sessions by completing the evaluation forms handed out at the sessions and the form in your registration materials. Forms can be returned to the box at the registration area; handed to any GIH staff member; faxed to 202.452.8340; or mailed to our office at 1100 Connecticut Avenue, NW, Suite 1200, Washington, DC 20036.

## **SERVICES FOR MEETING PARTICIPANTS**

### **Message Board**

A message board is available to meeting participants adjacent to the registration desk.

### **Business Center**

Photocopying, faxing, and other business services are available in the business center located on the lower B2 level of the hotel.

Hours:

Monday – Friday      7:00 a.m. – 7:00 p.m.  
Saturday – Sunday      8:00 a.m. – 3:00 p.m.

### **Faxes**

All incoming guest faxes can be sent to 415.486.8101.

### **Hungry?**

If you miss a meal, visit one of the following dining outlets located in the hotel (hours of operation subject to change). Room service hours of operation: 5:30 a.m. to 11:00 a.m. and 5:00 p.m. to 11:00 p.m.

#### 4<sup>th</sup> Street Bar and Grill

Showcasing sporting events on flat-screen LCD HDTVs, this restaurant serves casual lunch and dinner selections. Hours of Operation: 11:00 a.m. to 11:00 p.m.

Phone: 415.896.1600

#### Bin 55 Restaurant and Wine Bar

Relax at the bar and lounge located in the lobby serving hors d'oeuvres, a full dinner menu, and a wine list of 55 California wines. Hours of Operation: 3:00 p.m. to 1:00 a.m.

Phone: 415.896.1600

#### Mission Grill

Featuring contemporary California cuisine, this restaurant features fresh dining options and local produce for breakfast and lunch. Hours of Operation: 6:30 a.m. to 2:00 p.m.

Phone: 415.442.6003

#### Starbucks

Grab a quick cup of coffee at the Starbucks coffee house in the lobby. Open for breakfast and lunch Hours of Operation: 5:30 a.m. to 2:00 p.m.

Phone: 415.896.1600

## The View

Unwind with a beverage, light snacks, and a full dinner menu while enjoying a spectacular view of downtown San Francisco at this bar and restaurant near the Moscone Center on the 39<sup>th</sup> floor of the hotel. Hours of Operation: 4:00 p.m. to 1:00 a.m.

Phone: 415.896.1600

## **Shopping and Sightseeing Activities**

The hotel concierge is available to assist you with restaurant reservations, tickets, tours, and other questions about San Francisco attractions. The concierge is located on the lobby level.

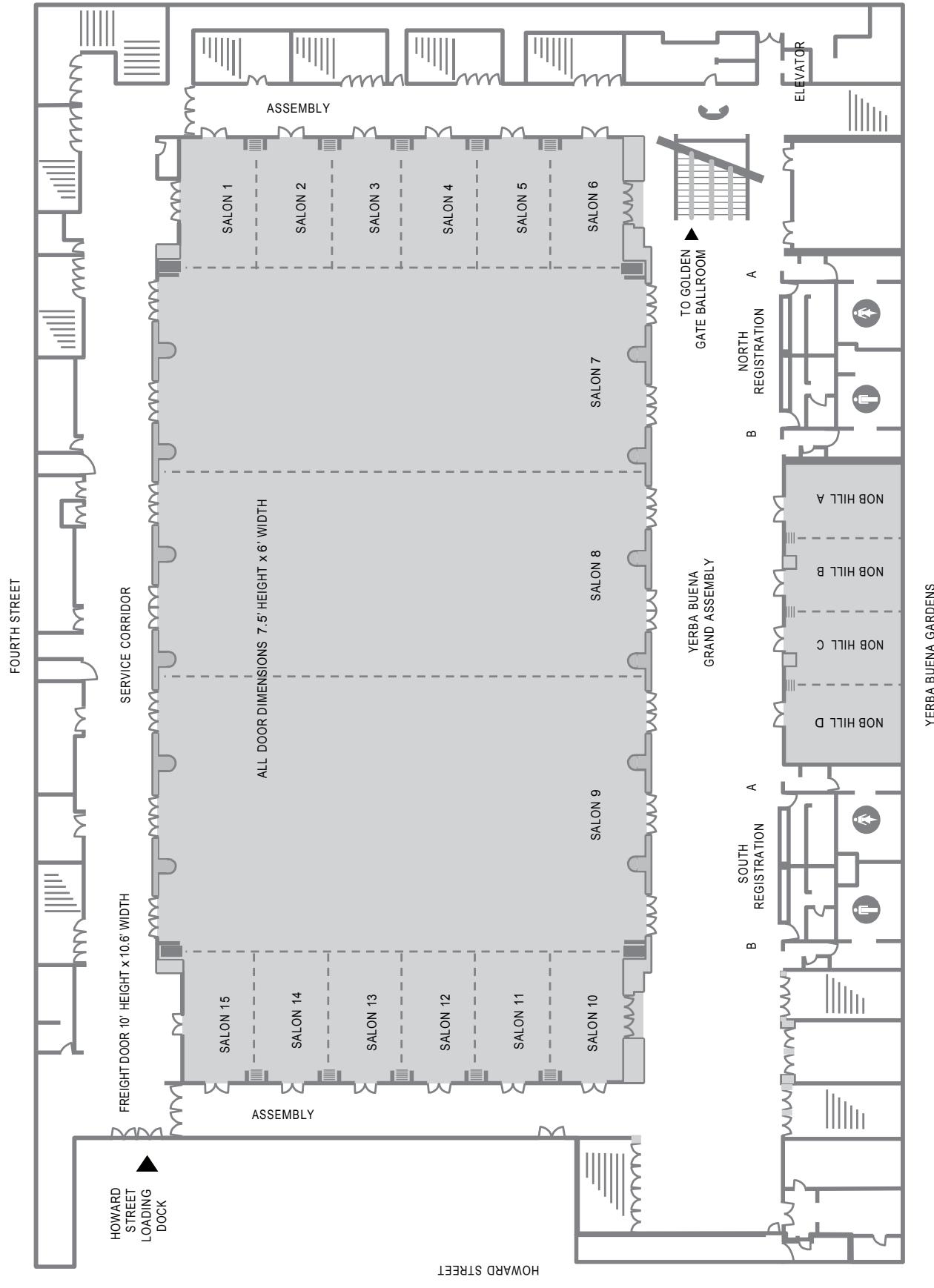
## **Parking**

Valet parking is available at the hotel. Overnight valet parking is \$60.00 per night. Self-parking is available at the Mission Street garage (833 Mission Street). The self-parking rate is \$4.00 per hour with no in-and-out charges.

Valet hourly rates are \$20.00 for the first hour, \$11.25 for each additional hour with a maximum of \$65.00.

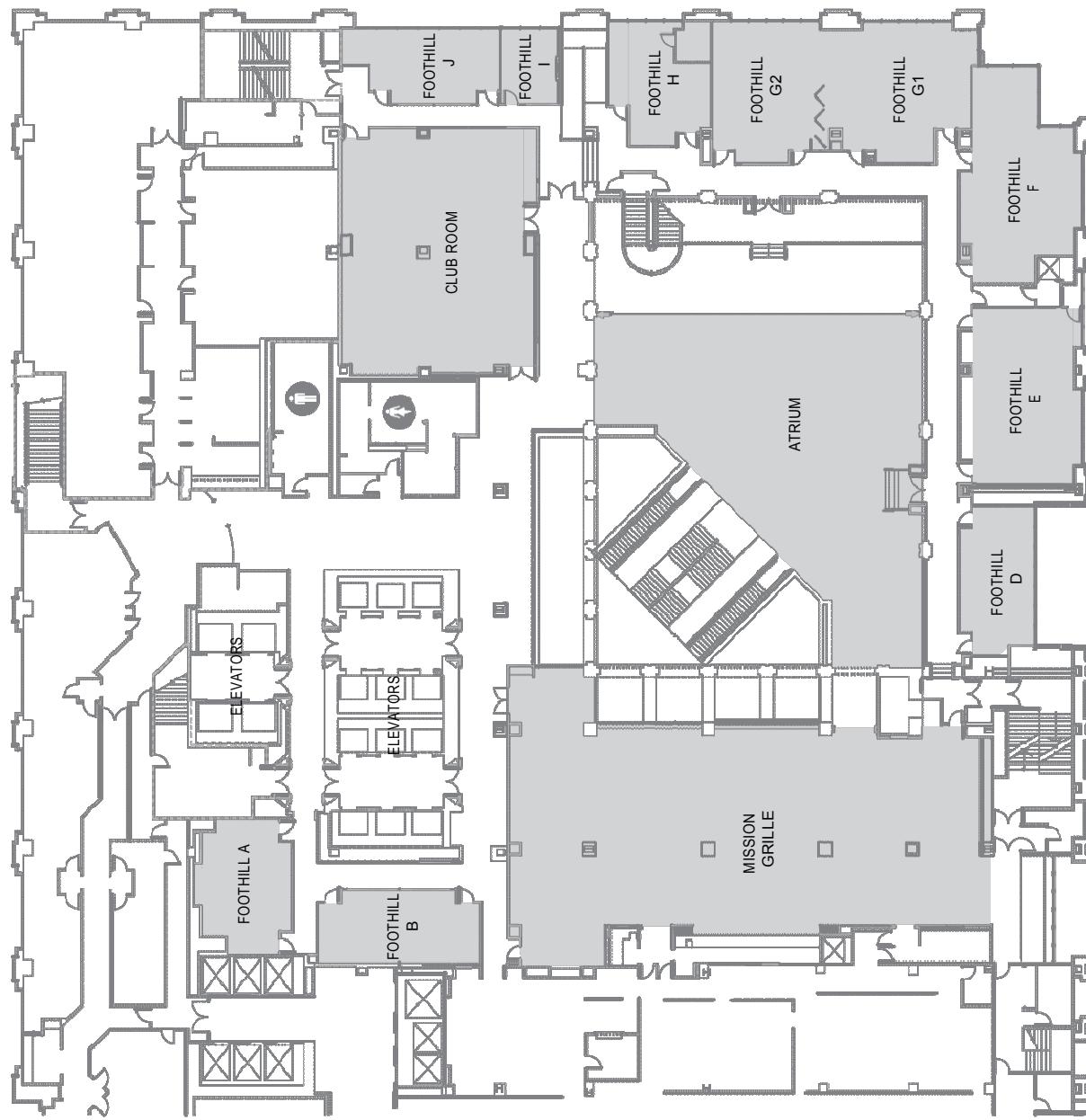
# Yerba Buena Ballroom

Lower B2 Level



## Foothill Meeting Rooms

SeCond Level





# Agenda: Wednesday, March 13

## Big Ideas to Blueprints: Decisive Grantmaking in Dynamic Times

Annual Meeting on Health Philanthropy

San Francisco Marriott Marquis  
San Francisco, California

8:00 a.m. – 6:45 p.m.

**Registration**  
*North Registration Desk, Lower B2 Level*

**Marketplace and Networking Café**  
*Atrium, Second Level*

9:00 a.m. – 3:00 p.m.

**Preconference: The Art & Science of Health Grantmaking**  
*(Separate registration required.)*  
**Foothill G, Second Level**

Designed for both staff and trustees—those new to the field and seasoned grantmakers—this program will explore the ins and outs of grantmaking and foundation operations, and provide opportunities for hands-on professional development. The preconference will offer concurrent two-hour modules delving into a range of issues, including foundation governance, finance and investments, grantmaking, and evaluation.

3:00 p.m. – 3:50 p.m.

**Newcomers' Welcome**  
*Club Room, Second Level*

Will this be your first time attending a GIH annual meeting? Start it off in a positive direction and attend the Newcomers' Welcome. Stop by to learn about GIH, for practical tips on navigating the meeting, and to meet other first-time attendees.

4:00 p.m. – 5:15 p.m.

**Opening Plenary: Community Resilience and Disaster Response**  
**Salons 8-9, Lower B2 Level**  
Welcoming Remarks: Faith Mitchell, *Grantmakers In Health*  
Introduction: Sam Karp, *California HealthCare Foundation and GIH Board of Directors*  
Remarks: Nicole Lurie, *U.S. Department of Health and Human Services*

As assistant secretary for preparedness and response at the U.S. Department of Health and Human Services, Nicole Lurie serves as Secretary Sebelius' principal advisor on matters related to bioterrorism and other public health emergencies. She is also responsible for coordinating health aspects of the federal response to Superstorm Sandy. Dr. Lurie will discuss why people do better in disasters when they have good social networks and connections, the importance of community resilience, and the role funders can play.

5:15 p.m. – 7:00 p.m.

**Welcome Reception**  
*Atrium, Second Level*

7:00 p.m. – 9:00 p.m.

**Film Night**

Join us to watch award-winning and compelling films that examine health and health care concerns, and different approaches to fixing them.

**Escape Fire: The Fight to Rescue American Healthcare**  
*Salons 4-6, Lower B2 Level*

Moderator: Gayle Ober, *George Family Foundation*  
Matthew Heineman, *Our Time Projects*  
Wayne Jonas, *Samueli Foundation*  
Dean Ornish, *Preventive Medicine Research Institute*

*Escape Fire* highlights the seemingly intractable problems of a broken health care system and focuses on transformative solutions, or “escape fires.” The film weaves narratives of patients with forward thinkers in medicine, industry, government, and the U.S. military. A facilitated discussion will take place afterward to engage funders on recognizing and replicating system transformation, as well as using film and media in their work.

**Who Cares about Kelsey?**  
*Nob Hill A-C, Lower B2 Level*  
Kim Firth, *Endowment for Health*

Dan Habib's film *Who Cares about Kelsey?* documents the lives of students with emotional and behavioral challenges, and shows innovative educational approaches that help these students succeed—while improving overall school culture and climate. *Who Cares about Kelsey?* will push viewers to reconsider “problem kids” and spark new conversations about empowering emotionally and behaviorally challenged youth. A facilitated discussion will follow the screening.

***The 2013 Annual Meeting on Health Philanthropy***

**WELCOME RECEPTION**

**5:15 – 7:00 p.m. | Atrium, Second Level**



Grantmakers In Health (GIH), in partnership with the **Metta Fund**, is pleased to welcome annual meeting attendees to San Francisco. Join us for the Welcome Reception (immediately after the Opening Plenary Session) located in the Atrium, Second Level, to sample the unique tastes of the area and distinctive, world-renowned flavors of Napa and Sonoma valleys. There's no better way to kick off three days of intensive learning, exciting discussion, and interactive exchange than to catch up with old friends and meet new colleagues.

Film Night, a new addition to the conference program, immediately follows (space is limited).



# Agenda: Thursday, March 14

## Big Ideas to Blueprints: Decisive Grantmaking in Dynamic Times

Annual Meeting on Health Philanthropy

San Francisco Marriott Marquis  
San Francisco, California

6:00 a.m. – 7:30 a.m.

### Group Exercise – Golden Gate Bridge Walk

*Please board the buses at the Mission Street entrance of the hotel (lobby level) at 5:45 a.m. Dress warmly with layers and wear appropriate running or walking shoes. Buses will depart promptly at 6:00 a.m. For security reasons, please wear your badge.*

6:30 a.m. – 7:30 a.m.

### Group Exercise – Yoga *Foothill B, Second Level*

7:00 a.m. – 4:00 p.m.

### Registration *North Registration Desk, Lower B2 Level*

### Marketplace and Networking Café *Atrium, Second Level*

8:00 a.m. – 9:30 a.m.

### Continental Breakfast *Yerba Buena Grand Assembly Foyer, Lower B2 Level*

8:00 a.m. – 9:30 a.m.

### Behavioral Health Funders Network Breakfast *Salon 4, Lower B2 Level* Linda Rosenberg, *The National Council*

### Healthy Eating/Active Living (HEAL) Funders Network Breakfast *Salon 1, Lower B2 Level* Lawrence Soler, *Partnership for a Healthier America*

### Integrative Health Funders Network Breakfast *Salon 2, Lower B2 Level* Dean Ornish, *Preventive Medicine Research Institute*

### Kids' Access Funders Network Breakfast *Salon 3, Lower B2 Level* Kathleen Hamilton, *The Children's Partnership* Suzie Shupe, *California Coverage and Health Initiatives*

**National Alliance for Health Equity (NAHE) Funders Network Breakfast**  
*Salon 5, Lower B2 Level*

**Oral Health Funders Network Breakfast**  
*Salon 6, Lower B2 Level*

Shelley Gehshan, *The Pew Charitable Trusts*  
Jenny Kattlove, *The Children's Partnership*

**Public Health Funders Network Breakfast**  
*Nob Hill A-B, Lower B2 Level*

Georges Benjamin, *American Public Health Association*  
Brian Castrucci, *de Beaumont Foundation*

10:00 a.m. – 11:00 a.m.

**Plenary: Transforming Health Care by Meeting Patients' Basic Needs**

*Salons 8-9, Lower B2 Level*

Introduction: Robin Mockenhaupt, *Robert Wood Johnson Foundation and GIH Board of Directors*

Remarks: Rebecca Onie, *Health Leads*

Rebecca Onie is cofounder and CEO of Health Leads, which has evolved since 1996 from a small student-driven campus organization to a fully staffed \$10 million organization with programs in 15 hospitals and clinics. Health Leads works with clinic partners to treat the nonmedical factors, like access to food and heat, that impact patients' health. As a fully integrated component of care delivery, it improves outcomes while lowering costs. Ms. Onie will discuss the transformative effects of comprehensive health care services that also address social needs.

11:00 a.m. – 11:30 a.m.

**Break**

11:30 a.m. – 1:00 p.m.

**Breakout Sessions**

**Assess and Address: Protecting Health Where We Live, Work, and Play**

*Salons 1-2, Lower B2 Level*

Session Designer: *The California Wellness Foundation*

David Fukuzawa, *The Kresge Foundation*

Earl Lui, *The California Wellness Foundation*

Michele Prichard, *Liberty Hill Foundation*

Kathy Sessions, *Health and Environmental Funders Network*

Improving conditions in which families live, work, and play is an essential part of improving health outcomes and reducing disparities. Yet health grantmakers typically have much more experience with the challenges of health care access or quality than with tackling community conditions such as air and water quality; housing stock; or the proximity of homes, clinics, and child care facilities to highways or industrial activity. The good news is that funders tackling local

11:30 a.m. – 1:00 p.m.

environmental health and justice issues have developed a wealth of experience in how to assess, address, and evaluate strategies to improve health by improving community conditions. Join this lively exchange of funder stories, resources, and lessons learned, including how to identify a realistic target, craft a smart strategy, develop capacity and partnerships, and build and keep board support.

### **Bridging Health Care Sectors to Advance the Oral Health of Pregnant Women**

#### **Salon 5, Lower B2 Level**

Session Designers: *Connecticut Health Foundation, W.K. Kellogg Foundation, and Washington Dental Service Foundation*

Patricia Baker, *Connecticut Health Foundation*

Renee Samelson, *Albany Medical College*

Laura Smith, *Washington Dental Service Foundation*

Alice Warner-Mehlhorn, *W.K. Kellogg Foundation*

Despite new evidence-based guidelines, many women remain unaware of the importance of maintaining good oral health during pregnancy. Pregnant women are more likely to develop oral health issues due to biological changes in their bodies, which can then adversely impact the health of the child. To address this, several foundations are supporting innovative collaborative efforts with health and community partners to improve the oral health of pregnant women. This session will explore model approaches to influencing health care delivery and social services systems and the health behaviors of pregnant women, including outcomes evaluation and the role foundations can play in translating research to practice to advance population health.

### **Creating and Measuring Success in Diversifying Approaches to Health**

#### **Salons 3-4, Lower B2 Level**

Session Designer: *The California Endowment*

Gail Christopher, *W.K. Kellogg Foundation*

David Maurrasse, *Marga Incorporated*

Yanique Redwood, *Consumer Health Foundation*

Sandra Witt, *The California Endowment*

Naima Wong, *Robert Wood Johnson Foundation*

Diversifying health-related practices within an organization is essential to creating and maintaining healthy and equitable communities. This session will provide a snapshot of The California Endowment, the W.K. Kellogg Foundation, the Robert Wood Johnson Foundation, and the Consumer Health Foundation's funding strategies to develop, implement, and measure approaches to improve health access and outcomes, with significant consideration of race, diversity, and inclusion. During the session, participants will have the opportunity to discuss approaches for embedding principles

11:30 a.m. – 1:00 p.m.

of diversity and equity within their institutional operations and grantmaking.

### **End-of-Life Care: Let's Talk About It**

*Club Room, Second Level*

Session Designer: *Jewish Healthcare Foundation*

Mary Jane Koren, *The Commonwealth Fund*

Kate O'Malley, *California HealthCare Foundation*

Nancy Zions, *Jewish Healthcare Foundation*

End-of-life can be a confusing time, and people have different preferences about how long and in what state they wish to be kept alive. Many times, however, the conversations that need to take place never occur. The quality of end-of-life care can and must improve in ways that are sensitive to each patient's wishes. The Jewish Healthcare Foundation, California HealthCare Foundation, and The Commonwealth Fund have supported different strategies that address their communities' attitudes toward death and dying, and tackle unique obstacles to providing end-of-life care. This session will demonstrate and discuss these different strategies and provide attendees the opportunity to participate in role-/scenario-based conversations.

### **Parks for Health**

*Foothill F, Second Level*

Session Designer: *The Colorado Health Foundation*

Monica Lyle, *The Colorado Health Foundation*

Tim Wohlgenant, *The Trust for Public Land*

Elisa Wong, *Kaiser Permanente*

Across the country, there is growing momentum to revitalize existing parks and build new ones. These parks can provide a space for gatherings and promote physical activity to help prevent or control many health conditions, including obesity, diabetes, hypertension, and depression. This session will focus on strategies for engaging residents and local partners in the park design and creation process to improve usage and strengthen long-term sustainability. Examples of park development and redevelopment from Colorado and across the country will be highlighted.

### **Partnering to Align Integrated Care Delivery and Payment**

*Foothill E, Second Level*

Session Designers: *The Colorado Health Foundation, Hogg Foundation for Mental Health, and Maine Health Access Foundation*

Becky Hayes Boober, *Maine Health Access Foundation*

Tanya Weinberg, *The Colorado Health Foundation*

Rick Ybarra, *Hogg Foundation for Mental Health*

Many health funders are supporting efforts to integrate physical and behavioral health services, but financial sustainability appears to be a significant barrier. This session will highlight how three foundations

11:30 a.m. – 1:00 p.m.

addressed this and other barriers to sustaining large, complex foundation initiatives by successfully using grantee experiences, data, and formal facilitation to change public policy. Strategies and practical tips to be discussed include: gathering meaningful information from grantees and other stakeholders; facilitating discussion among grantees, policymakers, and advocacy partners about politically sensitive topics; and creating policy recommendations to achieve both short-term and long-term goals.

### **Smoothing Payout in Volatile Financial Times**

#### ***Salon 6, Lower B2 Level***

Session Designer: *Isaacs/Jellinek and Robert Wood Johnson Foundation*

Dan DeLeon, *The California Endowment*

Peggi Einhorn, *Robert Wood Johnson Foundation*

Stephen Isaacs, *Isaacs/Jellinek*

René Seidel, *The SCAN Foundation*

Foundation plans for current and future grantmaking are often disrupted by fluctuations in financial markets. Grants may be diminished or delayed when markets drop. When markets rise, increased pay-out requirements can leave foundation staff scrambling to identify appropriate and worthwhile investment opportunities. This session will explore how some foundations have worked to smooth payout by involving their entire organization, including leadership, investment staff, financial management staff, and program staff.

### **Without a Net: Leveraging the Affordable Care Act**

#### ***Foothill G, Second Level***

Session Designer: *Robert Wood Johnson Foundation*

Heather Howard, *Princeton University*

Robert Hughes, *Missouri Foundation for Health*

Andy Hyman, *Robert Wood Johnson Foundation*

Jim Knickman, *New York State Health Foundation*

Even prior to the enactment of the Affordable Care Act (ACA), health reform has been fraught with uncertainty. From the perceived partisan nature of the ACA and the Supreme Court challenge to the November election outcome, funders have been operating in a shifting and dynamic environment. This session will explore the work of several foundations that have engaged in conceptualizing, operating, and monitoring state-based initiatives aimed at advancing the goals of the ACA. Funder panelists will examine the level of technical assistance and support their foundations provided to states, the capacity and evolving commitment of state governments, the challenges funders faced in developing and overseeing their ACA initiatives, and the decisionmaking processes funders employed in a constantly changing environment.

1:15 p.m. – 2:30 p.m.	<b>Terrance Keenan Leadership Award Luncheon</b> <i>Salons 8-9, Lower B2 Level</i> Introduction: Tom David, <i>GIH Board of Directors</i> 2013 Award Recipient: James Kimmey, <i>Saint Louis University (formerly with Missouri Foundation for Health)</i>
2:30 p.m. – 3:00 p.m.	<b>Break</b>
3:00 p.m. – 4:30 p.m.	<b>Breakout Sessions</b>  <b>The Boomer Explosion: A Creative Look at Aging and Communities</b> <i>Foothill F, Second Level</i> Session Designer: <i>National Center for Creative Aging</i> Janet Brown, <i>Grantmakers in the Arts</i> Tim Carpenter, <i>EngAGE, Inc.</i> Marc Freedman, <i>Encore.org</i> Gay Hanna, <i>National Center for Creative Aging</i>  Baby boomers are starting to reach the age of retirement. By 2030, there will be nearly 78 million Americans over the age of 65, providing communities with new challenges. Marc Freedman and Tim Carpenter will interview each other, with a focus on the needs of the aging boomer population, the importance and potential of creativity and life-long learning, and what health funders can do to support innovative programs and approaches. Marc Freedman is the author of two books on baby boomer retirement and Tim Carpenter is the radio host of Experience Talks, as well as a 2008 Ashoka Fellow.
	 <b>The Convergence Innovation Fund: Catalyzing Transformation</b> <i>Salon 5, Lower B2 Level</i> Session Designer: <i>Robert Wood Johnson Foundation</i> Justine Choy, <i>The Health Trust</i> John Govea, <i>Robert Wood Johnson Foundation</i> Ann Hoskins-Brown, <i>St. Christopher Foundation for Children</i> Chris Kabel, <i>Northwest Health Foundation</i> Shireen Malekafzali, <i>PolicyLink</i>  At the 2010 GIH annual meeting, the Convergence Partnership introduced a new approach to grantmaking—The Innovation Fund. The fund provided matching dollars to regional and local foundations to advance equity and policy change to create healthy communities. Two years later, the first grant period has come to a close and a host of impacts, challenges, and lessons learned will inform the next iteration of the fund. By sharing these outcomes, this session will describe ways to effectively implement innovative strategies to leverage limited dollars and create lasting impact and sustained transformation in both foundations and communities.

3:00 p.m. – 4:30 p.m.

**Creating Communities of Wellness and Resilience Where Children and Families Flourish**

**Salons 1-2, Lower B2 Level**

Session Designer: *Samueli Foundation*

Gail Christopher, *W.K. Kellogg Foundation*

Wayne Jonas, *Samueli Institute*

Michael Rhein, *Commonwealth ACTION*

Gerald Solomon, *Samueli Foundation*

Community wellness and resilience programs can be an effective strategy for shifting the health paradigm from a biomedical model (focused on diagnosis and clinical care), to one of whole health and well-being. Using these programs as a framework, presenters will highlight the potential role for communities to examine and address social, economic, and environmental conditions to help improve quality of life and emphasize prevention. Empowering vulnerable communities with evidence-based metrics can influence local health policies and programs, as well as inform both personal health choices and national decisionmaking. Session participants will engage in a thought-provoking discussion about the role funders can play in identifying these innovative opportunities.

**Playing the High-Stakes Game of Access: Developing and Connecting FQHCs to Deliver Care**

**Salons 3-4, Lower B2 Level**

Session Designer: *Quantum Foundation*

Kerry Diaz, *Quantum Foundation*

Kerry Jamieson, *Quantum Foundation*

Eric Kelly, *Quantum Foundation*

DeAnna Warren, *Genesis Community Health, Inc.*

Over the past several years, the number of uninsured individuals in Palm Beach County has grown while funding sources have declined, leaving the safety net increasingly disjointed and frayed. Join this session to learn about an initiative launched by the Quantum Foundation to build primary care capacity throughout the county by creating and expanding federally qualified health centers (FQHCs). Foundation representatives will share the effort's successes and failures, as well as unforeseen consequences along the way. Session attendees can test their assumptions about what is required to help grantees apply for and obtain FQHC status, and hear more about what is required to seed or lead a similar initiative to transform the local health care network through the FQHC model.

**Using PRIs to Bring Big Ideas to Life**

**Salon 6, Lower B2 Level**

Session Designer: *Robert Wood Johnson Foundation*

Flozell Daniels, Jr., *Foundation for Louisiana*

Ed Ghisu, *Robert Wood Johnson Foundation*

Margaret Laws, *California HealthCare Foundation*  
Jasmine Hall Ratliff, *Robert Wood Johnson Foundation*

Program-related investments (PRIs), a form of impact investing, advance a foundation's mission while allowing for recovery of principal investments or financial returns. Emphasizing below-market PRIs, this session will consider when PRIs are mission-appropriate, explore how impact investing can be used as part of a foundation's funding toolkit, and discuss how to make the case for PRIs to foundation management and boards.

**What's Keeping You Up at Night: CEOs/Navigating the Risk-Reward Proposition of Using Consultants**

*Foothill G, Second Level*

Session Designer: *REACH Healthcare Foundation*

Steve Coen, *Kansas Health Foundation*

Ann Monroe, *Health Foundation for Western and Central New York*

Brenda Sharpe, *REACH Healthcare Foundation*

This session will give foundation CEOs the opportunity to discuss the advantages and concerns of using consultants for programs and initiatives, and consider the broader question of how foundations can extend their reach.

**What's Keeping You Up at Night: Program Staff**

*Club Room, Second Level*

David Adler, *Robert Wood Johnson Foundation*

Cecilia Echeverría, *Kaiser Permanente*

Kim Firth, *Endowment for Health*

Lisa Shugarman, *The SCAN Foundation*

This popular, unstructured session gives foundation program staff an opportunity to talk candidly with their peers about the concerns and challenges facing their work.

**What's Keeping You Up at Night: Trustees**

*Foothill E, Second Level*

Karen Cox, *Health Care Foundation of Greater Kansas City*

Reggie Robinson, *Sunflower Foundation: Health Care for Kansans*

This unstructured session gives foundation trustees an opportunity to talk candidly with their peers about the challenges of foundation governance.

4:30 p.m. – 5:30 p.m.

**Break**

6:00 p.m. – 8:30 p.m.

**Reception at The Beaux Arts Ferry Building**

*Buses will depart from the Mission Street entrance (lobby level) beginning at 5:45 p.m. The last bus will return to the hotel from the Ferry Building at 8:30 p.m. For security reasons, please wear your badge.*



## The Terrance Keenan Leadership Award

*The Terrance Keenan Leadership Award in Health Philanthropy* annually recognizes an outstanding individual whose leadership and thoughtful application of philanthropic resources have had an impact on human health at the local, regional, national, or international level. The award was established in honor of Terrance Keenan and his more than 40 years of service and contributions to the field of health philanthropy while working at the Robert Wood Johnson Foundation and The Commonwealth Fund. It is intended to inspire others to strive toward his standard of excellence and to acknowledge those whose work embodies his spirit of innovation, compassion, and dedication.

### James R. Kimmey 2013 Award Recipient

*Dr. Kimmey's ability to recognize opportunity and blend it effectively within a vision and workable funding framework is an important skill he has brought to the world of philanthropy.*

James Kimmey, M.D., M.P.H. began his tenure at the Missouri Foundation for Health in 2001 without an office, staff, or funding strategy. By the time he retired in 2011, the foundation was the largest health-focused grantmaker in Missouri. As a foundation leader, he “pushed the envelope repeatedly”; encouraged staff to explore the “what if”; and actively embraced partnerships. He also encouraged and challenged grantmakers to be creative, to engage communities, and to favor action over long discussion.

Seizing opportunity and innovative grantmaking were hallmarks of his leadership, from addressing health workforce shortages and establishing the foundation as the nonpartisan voice in Missouri on health issues, to providing free HPV vaccines to thousands of Missouri women and girls, as well as crafting health literacy efforts. He was also instrumental in major programs and projects such as Missouri Capture, which assists organizations applying for federal funding available for health and prevention programs, and Cover Missouri, a project that promotes quality, affordable health coverage for state residents.

Innovative grantmaking, however, did not always mean “new” to Dr. Kimmey who once pointed out, “There are already hundreds of good programs out there that are providing wonderful services to thousands of people every day. The real tragedy would be if those services suddenly stopped.” At his urging, the foundation allocates 20 percent of annual grantmaking toward already-established programs.

Dr. Kimmey is described as humble, amazingly persistent, and devoted to helping the most vulnerable. “He is at his best when he is advocating for a policy or program that is controversial and on the cutting edge.”

Dr. Kimmey is currently professor emeritus and executive-in-residence at the Saint Louis University College for Public Health and Social Justice.

### **Past Terrance Keenan Award Recipients**

1993 Terrance Keenan, Robert Wood Johnson Foundation

1994 David Packard, The David and Lucile Packard Foundation

1995 Margaret E. Mahoney, The Commonwealth Fund

1996 Beverly Railey Walter, Claude Worthington Benedum Foundation

1997 David P. Ross, Bank of America and Victor E. Speas Foundation

1998 Mary K. Campuzano, Kansas Health Foundation

1999 John Murphy, The Flinn Foundation

2000 No award presented.

2001 Irving B. Harris, The Harris Foundation

2002 Thomas G. David, The California Wellness Foundation

2003 Gloria R. Smith, W.K. Kellogg Foundation

2004 David A. Gould, United Hospital Fund

2005 Frank Karel, Robert Wood Johnson Foundation

2006 Robert Eckardt, The Cleveland Foundation

2007 Mario Gutierrez, The California Endowment

2008 Terri Langston, Public Welfare Foundation

2009 Gary Yates, The California Wellness Foundation

2010 Mary Jane Koren, The Commonwealth Fund

2011 Drew Altman, The Henry J. Kaiser Family Foundation

2012 Margaret O'Bryon, Consumer Health Foundation



*In partnership with Kaiser Permanente, Grantmakers In Health is pleased to present:*

## ***AN EVENING AT THE BEAUX ARTS FERRY BUILDING***

*Buses will depart from the Mission Street entrance (lobby level) beginning at 5:45 p.m.*

*The last bus will depart The Ferry Building at 8:30 p.m.*

*For security reasons, please wear your badge.*



*A famous city's most famous landmark*

Herb Caen, Columnist for the *San Francisco Chronicle*

The original primary point of arrival and departure from San Francisco until the construction of the Golden Gate and Bay Bridges in the 1930s, the Ferry Building is listed in the National Register of Historic Places and is a registered landmark in the City of San Francisco. Inspired by the street markets of Paris, Harrods of London, Peck in Milan, and the Pike Place Market in Seattle, The Ferry Building Marketplace is a people's marketplace serving residents and traveler alike. Located on the Bay at the foot of world famous Market Street, shops large and small celebrate food in all its forms, offering everything from artisan cheeses to the freshest of local fish. During the day, The Ferry Plaza Farmers Market is a California certified farmers market operated by the Center for Urban Education about Sustainable Agriculture.

The main feature of the building's interior is the Great Nave, a 660-foot long, sky lit, two-story concourse, featuring an expansive historic marble mosaic floor, buff brick and terra cotta arches, monumental clathri and clerestory windows, and steel arched trusses.

On Thursday evening, GIH and **Kaiser Permanente** will transform the second floor of the Great Nave and welcome annual meeting attendees to experience the collaborative spirit of innovation, tradition, and beauty. An unparalleled menu highlighting northern California's finest cuisine and an

*(over)*

eco-conscious approach to entertaining will be featured. Local, sustainable, and organic food and beverage will be presented that feature northern California wines and farm-to-table menu selections.

Come and relax after a day of intense learning and spend an evening with friends and colleagues in an exquisite, award-winning setting. Buses will begin boarding promptly at 5:45 p.m. from the hotel's Motor Coach entrance on Mission Street. Shuttles will begin returning to the hotel at 8:00 p.m. until the event ends at 8:30 p.m. For security reasons, please wear your conference badge.

If you wish to bring a guest who is not registered for the annual meeting, please speak to a GIH staff member at the registration desk. Unfortunately, this event cannot accommodate guests under the age of 12.



# Agenda: Friday, March 15

## Big Ideas to Blueprints: Decisive Grantmaking in Dynamic Times

Annual Meeting on Health Philanthropy

San Francisco Marriott Marquis  
San Francisco, California

6:30 a.m. – 7:30 a.m.	<b>Group Exercise – Yoga</b> <i>Foothill B, Second Level</i>
7:00 a.m. – 1:00 p.m.	<b>Registration</b> <i>North Registration Desk, Lower B2 Level</i>
	<b>Marketplace and Networking Café</b> <i>Atrium, Second Level</i>
8:00 a.m. – 9:30 a.m.	<b>Breakfast Roundtables</b> <i>Salon 7, Lower B2 Level</i>
10:00 a.m. – 11:00 a.m.	<b>Plenary: Using the Educational Power of Media to Help Children Reach their Highest Potential</b> <i>Salons 8-9, Lower B2 Level</i> Introduction: Janelle Allen-Davis, <i>Kaiser Permanente Colorado and GIH Board of Directors</i> Remarks: Jeanette Betancourt, <i>Sesame Workshop</i>  <i>Sesame Street</i> was founded in 1969 to give disadvantaged children the same opportunities as middle-class children. Today, popular with children and families from all walks of life, <i>Sesame Street</i> addresses the educational needs of children through a combination of media, Muppets, and outreach initiatives in particularly vulnerable communities. Jeanette Betancourt, senior vice president for outreach and educational practices at Sesame Workshop, will discuss the research and partnerships supporting initiatives to help children establish an early foundation for healthy habits and build the resilience they need to cope during tough times.
11:00 a.m. – 11:30 a.m.	<b>Break</b>

11:30 a.m. – 1:00 p.m.

## Breakout Sessions

### **The Board's Role in Setting and Adopting a Health and Racial Equity Frame (trustees only)**

*Salons 1-2, Lower B2 Level*

Session Designer: *Consumer Health Foundation*

Christopher King, *Consumer Health Foundation*

Jacquelyn Lendsey, *Consumer Health Foundation*

Diane Lewis, *Consumer Health Foundation*

Naomi Mezey, *Consumer Health Foundation*

Brigette Rouson, *Consumer Health Foundation*

Funders' understanding of health inequities has evolved over the last few decades, and many health grantmakers are in the process of adopting new language and assessing new strategies to create breakthrough change in this area. Boards of trustees must be critical leaders and thought partners in this transformation process. Through an interactive fishbowl format, this session will engage foundation trustees in a dialogue about how boards can learn about and help implement a health equity agenda, drawing on the experience of the Consumer Health Foundation's board members.

### **A Case Study in Improving Care for Medicare-Medicaid Enrollees**

*Salon 6, Lower B2 Level*

Session Designer: *The SCAN Foundation*

Giovanna Giuliani, *California HealthCare Foundation*

Jack Hailey, *Government Action and Communication Institute*

Lisa Shugarman, *The SCAN Foundation*

Margaret Tatar, *California Department of Health Care Services*

California is one of 15 states participating in a Centers for Medicare and Medicaid Services demonstration project to better integrate care for patients eligible for both Medicare and Medicaid. The state is testing new approaches to organizing, financing, and delivering medical and supportive services. This session will discuss how several California foundations have worked collaboratively with state and federal policymakers, other key stakeholders, and each other to design and implement policies and practices that promise better care and outcomes for Medicare-Medicaid enrollees.

### **Foundations as Change Agents**

*Foothill F, Second Level*

Session Designer: *Maine Health Access Foundation*

Ann Monroe, *Health Foundation for Western and Central New York*

Wendy Wolf, *Maine Health Access Foundation*

Nancy Zions, *Jewish Healthcare Foundation*

Local, state, and regional foundations can advance health system transformation in a variety of ways beyond traditional grantmaking. By serving as conveners, researchers, educators, and advocates,

11:30 a.m. – 1:00 p.m.

foundations have catalyzed, reinvigorated, and sustained collaborative efforts to develop and implement innovative solutions. This session will explore the diverse roles philanthropy can play in health care delivery and financing reform, highlighting key challenges and strategies facing foundations acting as neutral, nonpartisan agents for change.

### **Funding Transformation: Breaking Silos to Prepare the AIDS Sector for Health Reform**

#### ***Foothill G, Second Level***

Session Designer: *Funders Concerned About AIDS*

Neil Giuliano, *San Francisco AIDS Foundation*

Michael Kaplan, *AIDS United*

Len McNally, *The New York Community Trust*

Ria Pugeda, *Consumer Health Foundation*

Christine Reeves, *National Committee for Responsive Philanthropy*

Michael Rhein, *Institute for Public Health Innovation*

Philanthropy has helped to create and sustain the AIDS response for over 30 years – but is the community ready for health reform and resulting changes to the public health landscape? With only 28 percent of people living with HIV/AIDS in the United States consistently accessing the treatment needed to keep their virus under control, health reform will transform how we fund prevention and treatment, and how we reach the communities where HIV/AIDS still thrives: men and women of color, men who have sex with men, and young people. This highly interactive session will explore key strategies from health and AIDS-related funders and allies on preparing for health reform, and will ask a critical question: how do we integrate without losing focus on AIDS?

### **Health Impact Assessment: Building Community Power and Advancing Equity**

#### ***Foothill E, Second Level***

Session Designer: *The California Endowment*

Lili Farhang, *Human Impact Partners*

Paulina Gonzalez, *Strategic Actions for a Just Economy*

Doran Schrantz, *ISALAH*

Beatriz Solís, *The California Endowment*

Alice M. Warner, *W.K. Kellogg Foundation*

Many foundations have supported the use of health impact assessment (HIA) as a strategy to improve health and equity. Funding has supported HIA projects on transportation, land use, housing, energy, education, and incarceration, and has targeted different types of practitioners. While extensive progress has been made, there remain challenges for funders to ensure that the practice of HIA continues and can be implemented in places with different degrees of community organization and capacity. Join this session to hear from HIA funders and community organizers about how HIA can be

11:30 a.m. – 1:00 p.m.

transformed into a systematic, on-the-ground grantmaking program that ultimately works in support of community priorities and builds community power.

**Transforming Behavioral Health Care with Integration and Assertive Case Management**

**Salons 3-4, Lower B2 Level**

Session Designers: *Health Care Foundation of Greater Kansas City and The New York Community Trust*

Janice Bogner, *The Health Foundation of Greater Cincinnati*

Robert Ferguson, *Jewish Healthcare Foundation*

Alan Flory, *ReDiscover*

Irfan Hasan, *The New York Community Trust*

Sarah Ricketts, *Montefiore Medical Center*

Kristen West, *Empire Health Foundation*

A better understanding of behavioral health's importance and the general need to improve health care access, quality, and cost-effectiveness have elevated the potential of integrated behavioral and physical health care and assertive case management (ACM) – two opportunities for funders to continue fueling the transformation of health care delivery. This session will stress the importance of behavioral health for comprehensive health care reform, present specific examples of roles that funders across the country have played in advancing these efforts, and share lessons learned to help others optimize their care integration and ACM program results.

**Transforming the Safety Net through Innovation and Risk Taking**

**Club Room, Second Level**

Session Designer: *Center for Care Innovations (Tides Foundation)*

Veenu Aulakh, *Center for Care Innovations (Tides Foundation)*

Margaret Laws, *California HealthCare Foundation*

Brenda Solórzano, *Blue Shield of California Foundation*

Post-Supreme Court decision and post-election, the stage is set for the fundamental transformation of the way the American health care system is organized and financed. In this changing landscape, it is crucial for safety net providers to take risks and adopt innovations that move the field toward more coordinated systems of comprehensive care. Learn how funders can, and are, promoting a culture of innovation and risk taking in environments that are typically extremely risk averse. Session attendees will become familiar with strategic approaches to support innovations in safety net settings, engage in a dialogue about risk taking and tolerance for failure both within foundations and in the safety net field, and identify and discuss opportunities for advancing the role philanthropy plays in supporting risk taking with grantees.

11:30 a.m. – 1:00 p.m.

**Using National Networks to Tackle Chronic Disease**

*Salon 5, Lower B2 Level*

Session Designer: *The Bridgespan Group*

Taz Hussein, *The Bridgespan Group*

Marcia Kerz, *Oasis Institute*

Jim Knickman, *New York State Health Foundation*

Jonathan Lever, *YMCA of USA*

Nonprofit national networks, such as the YMCA and the Boys & Girls Club of America, are powerful but often-underutilized forces in the fight against chronic disease. With a high-profile presence in their communities, a large number of people coming through their doors, and staff and volunteers with deep knowledge and expertise about the communities they serve, nonprofit national networks are well poised to bring evidence-based interventions to scale. Session participants will learn about the potential reach of national networks in the fight against chronic disease; the types of interventions best suited for networks; and the role that leaders in several key sectors, including philanthropy, need to assume if such networks are to realize their potential and bring effective prevention interventions to scale.

1:00 p.m. – 2:00 p.m.

**Closing Networking Lunch**

*Salons 8-9, Lower B2 Level*

1:30 p.m. – 4:00 p.m.

**Site Visits (Separate registration required.)**

*Please board buses at the Mission Street entrance (lobby level) at 1:15 p.m. Buses will depart promptly at 1:30 p.m. For security reasons, please wear your badge.*

**Designing, Building, and Maintaining Healthy Places**

The Health and Housing Funders' Forum will conduct a site visit that provides participants with a visual and experiential understanding of the impact of place on health. Participants will visit a senior community at the San Pablo Hotel, which provides community-based health care and residential services to older adult tenants. Presenters will showcase a campaign that creates and maintains healthy housing for low-income families living in single-room occupancy hotels, and promotes new legislation and policies to improve living conditions, while also empowering tenants to advocate for better housing conditions. Participants will then visit the West Oakland Residential Lead investigation area to learn about innovative approaches to lead clean-up efforts that have a far less negative impact on neighborhoods than traditional removal. Both locations will demonstrate how to balance concern for the immediate needs of vulnerable populations with the long-term investments that create real change.

1:30 p.m. – 4:00 p.m.

### **Expanding Access to Integrated Care through School-Based Health Centers**

This visit to the West Oakland Middle School Health Center will illustrate how school-based health centers (SBHCs) have added value and increased access to integrated health care in California. Two regional funders will discuss the strategy and role of a foundation in supporting and promoting SBHCs and share examples of expanded access to integrated behavioral, oral, and primary health care. Presenters will also describe how to best utilize the expertise and knowledge of local grantmakers in funder collaboratives and will address investing in these projects for long-term impact and sustainability. The site visit is organized by The Health Foundation of Greater Cincinnati and the S.D. Bechtel, Jr. Foundation.

### **Healthy Parks, Healthy People at Crissy Field - Golden Gate Bridge Walk**

*Please dress warmly with layers and wear appropriate running or walking shoes.*  
Join us for a walk around the beautifully restored Crissy Field Tidal Marsh. You will be joined by leaders of the Healthy Parks, Healthy People initiative from the National Park Service and the Golden Gate National Parks Conservancy and learn about the Kaiser Permanente-supported Park Prescriptions pilot in San Francisco and how this work is helping to build a national movement around the country. In addition, you will hear about the six-county Bay Area-wide coordinated effort to provide approachable, culturally relevant park programming for communities with high health needs that diverse health partners can prescribe and promote.



# Speaker Profiles

## **David Adler**

David Adler is a program officer at the Robert Wood Johnson Foundation (RWJF). In this role, Mr. Adler oversees numerous grants that are designed to help millions of Americans obtain stable, affordable health coverage; helps states learn from one another as they implement the Affordable Care Act (ACA); and ensures that key stakeholders have the information they need about the ACA. Mr. Adler joined RWJF in 2008 and worked as a communications associate and officer at the foundation before taking on his current role. Prior to joining RWJF, Mr. Adler served as communications director for The Food Trust, where he oversaw external communications about the organization's efforts, including the Comprehensive School Nutrition Policy Initiative; the organization's network of farmers' markets; and the Fresh Food Financing Initiative, the nation's first statewide program to attract supermarkets to underserved communities. Mr. Adler's previous professional experience includes consulting with hospitals and long-term care facilities about strategies for recruiting and retaining nurses, teaching English to speakers of other languages, and teaching abroad at the American School of Bilbao. Mr. Adler holds a bachelor of arts in history from Swarthmore College, a master of studies in Jewish studies from the University of Oxford, and a master of public administration from the University of Pennsylvania.

## **Veenu Aulakh**

Veenu Aulakh is associate director of the Center for Care Innovations (CCI), where she leads the programmatic activities related to supporting innovation and delivery system changes in primary care within safety net organizations in California. Before joining CCI, Ms. Aulakh worked as a senior program officer at the California HealthCare Foundation (CHCF) where she managed grants and program-related investments to organizations with innovations to lower the cost of care. She also led projects to improve the quality of primary care with an emphasis on information technology and patient engagement to improve care for people living with chronic disease. Before joining CHCF, Ms. Aulakh held a number of positions within Kaiser Permanente related to improving quality of care, developing disease management programs, and increasing patient engagement. She also worked as a project manager with the diagnostics division of Abbott Laboratories. Ms. Aulakh received a bachelor's degree in industrial and operations engineering from the University of Michigan and a master's degree in health policy and management from Harvard University.

## **Patricia Baker**

Patricia Baker was named president and CEO of the Connecticut Health Foundation in 2002 after serving as its executive director since it was established in 1999. Immediately prior, Ms. Baker served as the national program director for the March of Dimes Birth Defects Foundation and as director of Connecticut government programs at Oxford Health Plans. A long-time women's health advocate, Ms. Baker has previously served as executive director of Planned Parenthood of Connecticut, associate executive director of Planned Parenthood of Wisconsin, and executive director of The Women's Center in southeastern Wisconsin.

### **Georges Benjamin**

Georges Benjamin is executive director of the American Public Health Association (APHA), the United States' oldest and largest organization of public health professionals. For the last 20 years he has been actively practicing public health at the local, national, and international level. He is the publisher of the *American Journal of Public Health*; *The Nation's Health* newspaper; and the APHA's publication on infectious diseases, *Communicable Disease Manual*. Dr. Benjamin is a graduate of the Illinois Institute of Technology and the University of Illinois, College of Medicine. He is board certified in internal medicine and a fellow of the American College of Physicians, a fellow emeritus of the American College of Emergency Physicians, an honorary fellow of the Royal Society of Public Health, a fellow of the National Academy of Public Administration, and a member of the Institute of Medicine of the National Academies.

### **Jeanette Betancourt**

Jeanette Betancourt is senior vice president for outreach and educational practices at Sesame Workshop. She directs all Sesame Workshop community engagement initiatives reaching children and families most in need, as well as educators and service providers who make a difference in their lives. She designs these research-based, bilingual initiatives to impact children's school readiness, health, and social and emotional well-being. She also maintains a partnership network that enables the development, integration, and delivery of these initiatives. Prior to joining Sesame Workshop, Dr. Betancourt directed several educational programs for child care professionals at the Institute for Urban and Minority Education at the Teachers College, Columbia University and other organizations serving at-risk children. A licensed bilingual speech and language pathologist and educational therapist, Dr. Betancourt has degrees in speech and language pathology, bilingual reading, and a doctor of education in special education.

### **Janice Bogner**

Janice Bogner currently serves as a senior program officer at The Health Foundation of Greater Cincinnati. In this capacity she works with organizations throughout the foundation's 20-county area to develop innovative programs that deal with severe mental illness. She is responsible for working with grant applicants and grant recipients, following projects from concept to completion. Ms. Bogner began her career as psychiatric social worker working with the criminal justice system in Cincinnati followed by an appointment as director of psychiatric social work at The University Hospital. Ms. Bogner worked for The University Hospital for 21 years. Her last position there was director of social work with responsibilities that included overseeing medical and psychiatric social work services in inpatient, outpatient, and emergency areas of the hospital. She also maintains a volunteer faculty title of associate professor of clinical psychiatry in the University of Cincinnati Department of Psychiatry. Ms. Bogner is a licensed independent social worker in Ohio and is a member of the Academy of Certified Social Workers. She holds a bachelor's degree in social work from the Ohio State University and a master's degree in social work from Washington University.

### **Becky Hayes Booher**

Becky Hayes Booher, as a senior program officer at the Maine Health Access Foundation (MeHAF), leads initiatives that transform health care systems to provide patient-centered care. She oversees MeHAF's \$10 million investment to integrate behavioral health and primary care with 43 grants, at over 100 sites, with 150 partnering organizations. In addition to the grants, this initiative provides quarterly learning community meetings, a state policy committee, research and evaluation, and peer coaching and reimbursement technical assistance. Dr. Booher also works with administrative

advocacy grantees and is developing a Continuum of Care initiative for the foundation. She is a member of the Grantmakers In Health Behavioral Health Funders' Network Steering Committee. Prior to joining MeHAF, Dr. Boober retired from the State of Maine with over 20 years in public policy and administrative leadership working in the commissioners' offices of three state departments (Education, Health and Human Services, and Corrections), where she assisted with interagency, systemic improvement initiatives.

### **Janet Brown**

Janet Brown is a nationally recognized consultant, speaker, and teacher and currently serves as president and CEO of Grantmakers in the Arts (GIA). Until recently, she was an adjunct faculty member at Goucher College, teaching public policy and the arts. Prior to joining GIA, she was chair of performing and visual arts at Augustana College and executive director of South Dakotans for the Arts and the South Dakota Alliance for Arts Education. She began her arts management career in theatre where her work included Joseph Papp's New York Shakespeare Festival, the American Conservatory Theatre in San Francisco, and national and European tours. She began her theatre career as an actress at the Black Hills Playhouse and was co-owner of the Deadwood Production Company. A registered lobbyist for 15 years, Ms. Brown has received numerous awards for arts advocacy, including the Selena Roberts Ottum Award from Americans for the Arts and the Robert Gard Award from the University of Massachusetts Arts Extension Service. Ms. Brown has served on many local and national boards of directors, including Americans for the Arts and the American Folklife Center, and has been a panelist and site evaluator for the National Endowment for the Arts and several state arts agencies. She has an undergraduate degree in theatre and a master of public administration.

### **Tim Carpenter**

Tim Carpenter is the founder of EngAGE and host/producer of the EXPERIENCE TALKS radio show. EngAGE is a nonprofit that changes aging and the way people think about aging by transforming senior apartment communities into vibrant centers of learning, wellness, and creativity, providing life-enhancing arts, wellness, lifelong learning, community building, and intergenerational programs and events to thousands of seniors in Southern California. Mr. Carpenter catalyzed the creation of the Burbank Senior Artists Colony, a first-of-its-kind senior apartment community with high-end arts amenities and programs. Mr. Carpenter serves on the board of the National Center for Creative Aging, is an Ashoka Fellow, and a recipient of the James Irvine Foundation Leadership Award.

### **Brian Castrucci**

Brian Castrucci joined the de Beaumont Foundation in 2012 as the foundation's first chief program and strategy officer. In this role, Mr. Castrucci is responsible for managing grantmaking activities and has senior leadership responsibilities for contributing to the strategic design and tactical implementation of program initiatives. Prior to joining the foundation, Mr. Castrucci spent a decade working in governmental public health systems at the state and local levels. He has extensive experience in maternal and child health (MCH), including the Title V MCH Services Block Grant; the Special Supplemental Nutrition Program for Women, Infants, and Children; and the Part C IDEA early intervention program. Mr. Castrucci has taught public health courses at the graduate and undergraduate levels at Drexel University, Temple University, and Brooklyn College. He also previously worked at the Robert Wood Johnson Foundation. Mr. Castrucci was the 2009 recipient of the Young Professional Achievement Award sponsored by the Coalition for Excellence in MCH

Epidemiology and received the 2010 Young Leadership in MCH Award from the Health Resources and Services Administration. He has published more than 30 articles in the areas of breastfeeding, tobacco control, obesity, and health policy and has served on many government and nonprofit committees devoted to improving the public's health. Mr. Castrucci graduated with a bachelor's degree in political science from North Carolina State University and with a master's degree from Columbia University.

### **Justine Choy**

Justine Choy brings extensive grantmaking, evaluation, and management experience to her position as director of grantmaking at The Health Trust. Before joining the trust, Ms. Choy worked as a program officer with The California Endowment, Peninsula Community Foundation, and the Koret Foundation, giving her a well-rounded knowledge of the San Francisco Bay Area nonprofit and health landscape. Ms. Choy holds a master's degree in public administration from San Francisco State University and a bachelor of arts in international relations from the University of California, Davis. In addition to her professional career, Ms. Choy is an active volunteer in the education field.

### **Gail Christopher**

Gail Christopher is vice president for program strategy at the W.K. Kellogg Foundation. She leads the Food, Health & Well-Being; Racial Equity; and Community & Civic Engagement and Leadership programming. Dr. Christopher is a nationally recognized leader in health policy, with particular expertise and experience in the issues related to social determinants of health, health inequities, and public policy issues of concern to our nation's future. Her distinguished career and contributions to public service were honored in 1996 when she was elected as a fellow of the National Academy of Public Administration. In 2011 she was awarded the Change Agent Award by the Schott Foundation for Public Education. In 2012 she was the recipient of the Association of Maternal & Child Health Programs John C. MacQueen Lecture Award for her innovation and leadership in the field of maternal and child health. She is president of the board of the Trust for America's Health and serves on the Grantmakers In Health board.

### **Steve Coen**

Steve Coen has served as president and CEO of the Kansas Health Foundation since 2008. Since joining the foundation in 1987, Mr. Coen has held a number of different positions, including director of public affairs, program officer, and vice president for administration. Before coming to the foundation, Mr. Coen served as a legislative assistant to Senator Bob Dole in Washington, DC, and as state director of his four Kansas offices. In addition to his professional experiences, Mr. Coen is involved with his church and is a member of the leadership council of the Greater Wichita Economic Development Coalition. Mr. Coen completed his undergraduate work at Emporia State University and later earned a law degree from Washburn University.

### **Karen Cox**

Karen Cox currently serves as executive vice president and co-chief operating officer for Children's Mercy Hospitals and Clinics, an independent, academic medical center in Missouri. Dr. Cox led the organization to receive Magnet designation by the American Nurses Credentialing Center, the first hospital in Missouri and the region to do so. Dr. Cox began her nursing career as a licensed practical nurse. From 1999 to 2002, Dr. Cox served as a fellow in the Robert Wood Johnson Executive Nurse Fellowship Program and is currently a fellow of the American Academy of Nursing, where she is also serving as the secretary of the board of directors. Dr. Cox has also served as board chair

of the National Initiative for Children's Healthcare Quality and is a current board member and board chair of the University of Kansas Research Institute and the Health Care Foundation of Greater Kansas City. She was appointed to a term on the National Advisory Council on Nurse Education and Practice at the Health Resources and Services Administration. Dr. Cox received an associate's degree in nursing from Excelsior College; a bachelor of science in nursing from the University of Kansas; and a master of science in nursing and doctor of philosophy from the University of Missouri, Kansas City.

### **Flozell Daniels, Jr.**

Prior to his appointment as CEO of the Louisiana Disaster Recovery Foundation in 2007, Flozell Daniels served as Tulane University's executive director of state and local affairs and as an urban policy specialist for the Office of the Mayor in New Orleans. In his current role as CEO, Mr. Daniels is focused on civic capacity building, equitable public policy, community development finance, and leadership development. Mr. Daniels has served as board chairman of the Urban League, is a former director of Associated Catholic Charities of New Orleans, and is chairman and a founding director of the Orleans Public Education Network. He also spent six years as a research associate for the U.S. Department of Agriculture. Mr. Daniels, a proud graduate of New Orleans Public Schools, is an alumnus of Tulane's master of business program and earned a bachelor's degree in biological sciences from the University of New Orleans.

### **Dan DeLeon**

Dan DeLeon joined The California Endowment in 2008 as vice president and CFO and is responsible for overseeing all aspects of the endowment's financial functions, including finance, tax compliance, planning and analysis, audit, and program-related investments. Prior to joining the endowment, Mr. DeLeon was the Los Angeles regional vice president of finance for Time Warner Cable, where he was responsible for the financial operations of the largest corporate division serving 2 million customers in Southern California. In 2009 he was named CFO of the Year by the *Los Angeles Business Journal*. Mr. DeLeon earned his bachelor's degree in accounting from the University of Southern California.

### **Kerry Diaz**

Kerry Diaz currently serves as president of the Quantum Foundation. Prior to this, Ms. Diaz served as director of the California Center for Assisted Living, director of policy for the California Association for Health Services at Home, regional director of the National Environmental Advisory Task Force, and as a legislative analyst for the Juvenile Justice Committee for the Florida House of Representatives. Ms. Diaz has been admitted to the Bar in New Jersey, Pennsylvania, and Florida. She serves on the executive committee of the Economic Council of Palm Beach County, is a member of the Community Alliance board, and is the chair of the Health Funders Group of the Florida Philanthropic Network. Ms. Diaz graduated with a bachelor's degree in English from Villanova University and earned her law degree at Florida State University College of Law.

### **Cecilia Echeverría**

Cecilia Echeverría currently serves as director of safety net partnerships at Kaiser Permanente. She previously worked for the Blue Shield of California Foundation where she managed the portfolio of grants focused on strengthening California's health care safety net. Prior to that, Ms. Echeverría served as a senior program officer with The California Endowment where she provided strategic direction to efforts to promote school health, expand public health insurance coverage, and

strengthen the health care safety net. Additionally, she was a policy analyst at the California HealthCare Foundation where she helped develop and evaluate programs that leveraged Medicare and Medi-Cal. Outside philanthropy, she has served as a legislative analyst for the Congressional Research Service in Washington, DC, and as a special projects associate for the Alameda County Public Health Department. Ms. Echeverría earned a bachelor of arts in social welfare, a master's degree in public policy, and a master's degree in public health from the University of California, Berkeley. She is an alumnus of the Presidential Management Fellowship program.

### **Peggi Einhorn**

Peggi Einhorn is CFO and treasurer of the Robert Wood Johnson Foundation. In this capacity, she is responsible for accounting, tax, budgeting, payout planning and program due diligence, and financial monitoring. Ms. Einhorn is a former senior vice president of J.P. Morgan Chase, where she worked in a variety of roles for over 24 years. She is the former chairwoman of the board of the Brooklyn Children's Museum and remains an active member of the board's executive committee. She also was a 1999 recipient of a David Rockefeller Fellowship from the New York City Partnership. Ms. Einhorn received her master of business administration from Columbia University's Graduate School of Business and a bachelor's degree from William Smith College.

### **Lili Farhang**

Lili Farhang joined Human Impact Partners in 2009 and serves as one of its two co-directors. Guided by her long-standing belief that health is a product of social, economic, and political forces, Ms. Farhang works with community organizations, government agencies, and others to re-conceptualize how health is understood and how we can collectively improve health by taking action in non-health domains. As one of the first practitioners of health impact assessment (HIA) in the United States, she has extensive experience in the management, research, and community engagement aspects of HIA. She led the first community-based HIA in the country and has since conducted over a dozen HIAs. Ms. Farhang also provides training and technical assistance to aspiring practitioners, using her practical experience to guide how HIAs are conducted, how public engagement is incorporated, and, ultimately, how research that is meaningful and responsive to community and stakeholder needs is generated.

### **Robert Ferguson**

Robert Ferguson is program manager for the Jewish Healthcare Foundation, focusing on Partners in Integrated Care, an initiative funded by the Agency for Healthcare Research and Quality that aims to integrate physical and behavioral health in primary care practices. He is responsible for developing tools, coordinating multistate implementation, federal reporting, and assisting the steering committee with policy development. He also serves as the site director for Care of Mental, Physical, and Substance Use Syndromes in Pennsylvania, a collaborative care management initiative led by the Institute for Clinical Systems Improvement and funded by a Health Care Innovation Award. Additionally, Mr. Ferguson provides support to the Pennsylvania Health Funders Collaborative, a statewide network of 31 health foundations that strives to improve the effectiveness of health funders' initiatives by creating a unified voice among Pennsylvania health funders and focusing on the intersection of health philanthropy and policy.

### **Kim Firth**

Kim Firth is a program director at the Endowment for Health, where she manages a portfolio of grants, projects, and policy initiatives addressing children's mental health and geographic barriers to

health. Before joining the endowment, she served as a planning and policy analyst for the New Hampshire Department of Health and Human Services Office of Health Planning and Medicaid. She also served as grant manager for the Health Care Fund, Community Grant Program, a public endowment created by the New Hampshire Legislature. Prior to working at the New Hampshire Department of Health and Human Services, Ms. Firth served as project director for the Strafford County Domestic Violence Project, a federally funded initiative to create a multidisciplinary prosecution team for domestic violence criminal cases. She also served as director for the AmeriCorps Victim Assistance Program, which used AmeriCorps members as advocates for survivors of domestic and sexual violence in district courts and police departments.

### **Alan Flory**

Alan Flory has worked at ReDiscover for 18 years and currently serves as president and CEO. He has over 38 years of experience in the field of mental health and substance abuse. He serves on several boards and committees throughout the Kansas City area, including the Health Care Foundation of Greater Kansas City's Community Advisory Committee, Community Network for Behavioral Health Care, Missouri Mental Health Coalition, Metropolitan Council of Community Mental Health Centers, Lee's Summit Health Education Advisory Board, Lee's Summit and Grandview Chamber Government Relations Committees, Lee's Summit Civic Roundtable, New Directions Behavioral Health Provider Advisory Committee, Timberlakes Estates Homeowners' Association, and others. Mr. Flory earned his bachelor's degree from McPherson College in McPherson, Kansas, and received a master's degree in counseling from Arizona State University.

### **Marc Freedman**

Marc Freedman is CEO and founder of Encore.org, a nonprofit organization working to promote encore careers – second acts for the greater good. He spearheaded the creation of Experience Corps and The Purpose Prize. He is the author of *The Big Shift: Navigating the New Stage Beyond Midlife*. Recognized by *Fast Company* magazine in 2007, 2008, and 2009 as one of the nation's leading social entrepreneurs, Mr. Freedman and Encore.org also received the Skoll Award for Social Entrepreneurship at Oxford University in 2010. A graduate of Swarthmore College, Mr. Freedman has a master of business administration from Yale University and was a visiting research fellow of Kings College, University of London.

### **David Fukuzawa**

As program director with The Kresge Foundation, David Fukuzawa directs the Health Program area, which seeks to reduce health disparities by addressing inequities in social and physical environments of vulnerable populations and improving access to quality health care. Prior to joining Kresge, Mr. Fukuzawa served as a program officer at The Skillman Foundation, a private foundation in metropolitan Detroit, whose focus is on children, youth, and families. Before entering the field of philanthropy he served as the human needs director at New Detroit, Inc., the nation's first urban coalition, where, among other things, he fashioned New Detroit's position against state budget cuts in welfare in the early 1990's and helped craft its policy on health care reform.

### **Shelly Gehshan**

Shelly Gehshan has directed the Pew Children's Dental Campaign since 2008. She is a children's advocate and health policy expert with over 20 years of experience working for state policymakers on issues affecting low-income families. Prior to joining Pew, she held senior posts at the Academy for State Health Policy, the National Conference of State Legislatures, and the Southern Governors'

Association. In 2011 Ms. Gehshan won the Public Service Award from the American Association of Public Health Dentistry for dedication to prevention throughout her career. Ms. Gehshan was selected to serve on the committee for the 2011 Institute of Medicine report *Improving Access to Oral Health Care for Vulnerable and Underserved Populations*. She has a bachelor's degree in English from Cornell University and a master's degree in public policy from the University of California, Berkeley.

### **Ed Ghisu**

As senior counsel at the Robert Wood Johnson Foundation (RWJF), Ed Ghisu works on the foundation's investment matters; co-chairs the foundation's Impact Capital Committee; and serves as a legal representative for the Quality/Equality Targeted Portfolio team, as well as the Vulnerable Populations and Pioneer Portfolio teams. He also works with RWJF's Human Resources department on employee benefit and retirement plan matters. Mr. Ghisu joined RWJF in 2006 after serving in private practice for 12 years, most recently as a business and finance attorney with Ballard Spahr Andrews & Ingersoll. His practice focused primarily on partnership and joint venture transactions and securities law matters. Prior to his employment with Ballard Spahr, he worked as a commercial litigator for Hanglev Aronchick Segal & Pudlin, and Drinker Biddle & Reath, LLP. Mr. Ghisu received his juris doctor from the Temple University School of Law and his bachelor's degree in political science from West Chester University.

### **Giovanna Giuliani**

Giovanna Giuliani is a senior program officer for the California HealthCare Foundation's Better Chronic Disease Care program. In this capacity, she manages the foundation's work in complex care management, including supporting care for the "duals" (people eligible for Medicaid and Medicare) population. Ms. Giuliani has spent over 15 years in health care working in quality improvement roles and has developed expertise in chronic disease, pediatric, and maternity care, as well as patient experience and measurement techniques. Previously she worked for the Pacific Business Group on Health, most recently as director of the California Quality Collaborative, where she led the development of a portfolio of programs to improve the triple aim. Earlier, she was a senior consultant on patient experience at Kaiser Permanente, a manager in Blue Shield of California's new product development group, and an analyst at Brigham and Women's Hospital. Ms. Giuliani received a master of business administration and master of public health from the University of California, Berkeley.

### **Neil Giuliano**

Neil Giuliano was appointed CEO of the San Francisco AIDS Foundation in 2010, bringing over three decades of executive leadership experience to the foundation. Established in 1982, the foundation is one of the oldest and largest AIDS organizations in the world. Before joining the foundation, Mr. Giuliano served as president of the Gay & Lesbian Alliance Against Defamation (GLAAD) and executive producer of GLAAD Media Awards. Mr. Giuliano was the youngest person ever elected mayor of Tempe, Arizona, and served from 1994 to 2004. Concurrent to his elected official post, he held numerous senior roles at Arizona State University, including co-chair of the final presidential debate in 2004. He was named to the "Out 100" by *Out Magazine* in 2005 and was invited as a distinguished lecturer to the William J. Clinton School of Public Service at the Clinton Presidential Library in 2009. His first book, *The Campaign Within: a Mayor's Private Journey to Public Leadership*, was published in 2012. Mr. Giuliano received a bachelor's degree in communication and a master of education in higher education from Arizona State University. He also completed the Harvard Kennedy School of Government Advanced Program for State and Local Officials.

### **Paulina Gonzalez**

Paulina Gonzalez is executive director of Strategic Actions for a Just Economy (SAJE), a community-based organization in South Los Angeles. SAJE's mission is to change public and corporate policy in a manner that provides concrete economic benefits to working class people. Prior to her work with SAJE, Ms. Gonzalez was a founding board member of the Figueroa Corridor Coalition for Economic Justice where she worked to oppose the gentrifying trends pushing working class families out of the neighborhood surrounding the University of Southern California. Ms. Gonzalez' work in the social justice field has included organizing farm workers in California and hotel workers in Los Angeles, spearheading community support efforts for workers who were detained in immigration raids, and organizing public actions in support of immigration reform with a path to citizenship for the undocumented.

### **John Govea**

John Govea is a senior program officer with the Robert Wood Johnson Foundation where he is a member of the Childhood Obesity Team. Prior to joining the foundation, Mr. Govea served as manager of youth service for California Volunteers in the Office of the Governor in California where he worked to engage youth in community service. He has prior experience in philanthropy with the Community Foundation for Monterey County and The David and Lucile Packard Foundation. He also had a 15-year career as an attorney representing farm workers suffering work injuries. Mr. Govea received his juris doctor from the University of California, Berkeley; a master of public administration from the John F. Kennedy School of Government at Harvard University; and a bachelor's degree from Stanford University.

### **Jack Hailey**

Through the nonprofit Government Action and Communication Institute (GACI), Jack Hailey provides staff support to the California Collaborative for Long-Term Services and Supports. He joined GACI in 2011 after 25 years with the California State Senate, at its Office of Research and as staff director of the Health and Human Services Committee. While with the Senate, Mr. Hailey served on the executive committee of the National Conference of State Legislatures and was the staff chair of several policy committees.

### **Kathleen Hamilton**

Kathleen Hamilton joined The Children's Partnership's (TCP) senior staff in 2010. As director of Sacramento Governmental Affairs, she serves as TCP's link to government agencies. Ms. Hamilton has extensive experience within state agencies and the legislature, as well as an in-depth understanding of health policy. As the former director of the California Department of Consumer Affairs, she oversaw regulation of medical professionals and created consumer information and protection programs. Most recently she served as the California Public Employees' Retirement System deputy executive officer, where she managed health benefit and health reform issues. Following a long staff career in the state legislature, she returned to serve as legislative director for assembly member Dave Jones, now California's Insurance Commissioner. During Governor Brown's administration, she was appointed executive director of the California Health Facilities Financing Authority.

### **Gay Hanna**

Gay Hanna, an arts administration leader with 30 years' management experience in the arts, education, and health-related program services, is executive director of the National Center for

Creative Aging (NCCA), an affiliate of The George Washington University. NCCA is an interdisciplinary nonprofit organization dedicated to fostering an understanding of the vital relationship between creative expression and the quality of life for older people regardless of ethnicity, economic status, or level of physical or cognitive functioning. NCCA provides professional development and technical assistance, including service as a clearinghouse for best practices, research, and policy development to encourage and sustain arts and humanities program in various community and health care settings.

### **Irfan Hasan**

Irfan Hasan, program officer at The New York Community Trust, covers grantmaking in the areas of health services and health policy, children and youth with disabilities, mental health and mental retardation, and people with visual disabilities. He also manages the animal welfare grantmaking portfolio. Following September 11, 2001, he was instrumental in emergency mental health response grantmaking through the trust's September 11<sup>th</sup> Fund. Before joining the trust in 2000, Mr. Hasan spent eight years at Greater Boston Rehabilitation Services, developing and overseeing programs to help people with disabilities, chronic health problems, and other barriers to employment return to work. He is a mayoral appointee to the New York City Department of Health and Mental Hygiene's Community Service Board, a member of Grantmakers In Health's Behavioral Health Funders Network, and Philanthropy New York's Health Policy working group. He is a former member of the Board of Directors of the Disability Funders Network, serving as chairman from 2007 to 2011; a former co-chair of the U.S. Student Selection Committee for the United World Colleges; and has served on the planning committee for two Council on Foundations annual conferences. Mr. Hasan earned a bachelor's degree in sociology from Northeastern University and holds a master's degree in public administration from the Wagner Graduate School of Public Service at New York University.

### **Matthew Heineman**

Matthew Heineman directed and produced *Escape Fire: The Fight to Rescue American Healthcare*, a feature documentary about what it is like to be young in today's America, which premiered on the Documentary Channel in 2011 and simultaneously on numerous digital platforms. He has directed a number of short films and commercials, and for two years he collaborated with Susan Froemke and a team at HBO on the groundbreaking, Emmy-nominated HBO series, *The Alzheimer's Project*, which aired in May 2009.

### **Ann Hoskins-Brown**

Ann Hoskins-Brown is program director at St. Christopher's Foundation for Children, where she develops and manages the foundation's programs and initiatives, including the Community Oral Health Initiatives, Farm to Families, and designated fund grantmaking, while also working to identify needs and evaluate options for new mission-aligned initiatives. She collaborates with staff and the board to set strategic direction, create and oversee the creation of program plans and evaluations, and provide technical assistance to applicant organizations and grantees. In addition to her work at St. Christopher's, Ms. Hoskins-Brown served as a commissioner on Philadelphia's Zoning Code Commission. The new code, as written by the Commission, recently received the 2013 National Planning Excellence Award for a Best Practice from the American Planning Association, which recognized its innovative approach at leveraging the synergy between citizen education, planning, and zoning reform. She is a graduate of Temple University and has done graduate work at Drexel University.

### **Heather Howard**

Heather Howard is a lecturer in public affairs at Princeton University's Woodrow Wilson School of Public and International Affairs; director of the State Health Reform Assistance Network, a Robert Wood Johnson Foundation initiative providing technical assistance to states implementing the Affordable Care Act; and a faculty affiliate of the Woodrow Wilson School's Center for Health & Wellbeing. She served as New Jersey's commissioner of health and senior services from 2008 to 2010, overseeing a cabinet-level agency responsible for public health services, regulation of health care institutions, senior services, and health care policy and research. She also has significant federal experience, having worked as Senator Jon Corzine's chief of staff, as associate director of the White House Domestic Policy Council, as senior policy advisor for First Lady Hillary Clinton, as an honors attorney in the U.S. Department of Justice's Antitrust Division Health Care Task Force, and for the U.S. House of Representatives.

### **Robert Hughes**

Bob Hughes became president and CEO of the Missouri Foundation for Health (MFH) in January 2012. Before joining MFH, he was a visiting research professor in the Center for State Health Policy at Rutgers University and served in various leadership positions for over 20 years at the Robert Wood Johnson Foundation. Earlier in his career, Dr. Hughes was an assistant professor of health administration and policy at Arizona State University, and a Pew postdoctoral fellow in health policy at the University of California, San Francisco. He has published extensively, focusing on philanthropic learning, the effect of grantmaking on improving health and health care, and health policy issues. Dr. Hughes received his doctorate in behavioral sciences from the Johns Hopkins University School of Hygiene and Public Health.

### **Taz Hussein**

Taz Hussein is a partner in the Boston office of The Bridgespan Group, a nonprofit advisor and resource for mission-driven organizations and philanthropists, and coleads Bridgespan's public health practice. Mr. Hussein has led multiple engagements with Robert Wood Johnson Foundation grantmaking teams and grantees, as well as strategic planning processes with several regional funders and conversion foundations. Mr. Hussein's work with nonprofits has included business planning with YMCA of the USA to further scale up YMCA's Diabetes Prevention Program and the development of a comprehensive program plan to address overweight and obesity with the Harlem Children's Zone. Prior to joining Bridgespan, Mr. Hussein was a consultant at McKinsey & Company. Before beginning his consulting career, he worked with Boston-area nonprofits addressing affordable housing issues for people with HIV/AIDS and substance abuse histories. Mr. Hussein currently serves on the board of the Boston chapter of Playworks. He is a graduate of the Massachusetts Institute of Technology and Harvard Business School.

### **Andrew Hyman**

Andrew Hyman currently serves as team director for the Robert Wood Johnson Foundation's Coverage team, where he is responsible for developing and executing strategies designed to achieve the foundation's goal of securing for all Americans meaningful access to health care coverage. Having joined the foundation in 2006 as a senior program officer in the Health Care Group, he and the Coverage team work with policymakers, researchers, and advocates to help the nation's leaders craft and enact policies designed to expand coverage. Mr. Hyman came to the foundation after serving as director of government relations and legislative counsel for the National Association of State Mental Health Program Directors. In that role, he sought to advance policies that secure

positive health outcomes and full community participation for individuals with mental disorders. Prior to his work in the mental health field, Mr. Hyman was deputy director and then director of the Office of Intergovernmental Affairs at the U.S. Department of Health and Human Services (HHS), serving as Secretary Donna Shalala's liaison to state, local, and tribal governments. His work at HHS also included efforts to combat tobacco use, implement the Children's Health Insurance Program, and advise the secretary on Medicaid. He began his service at HHS as the special assistant to the general counsel in 1993. Mr. Hyman received a juris doctor from the Fordham University School of Law and a bachelor's degree from Columbia College.

### **Stephen Isaacs**

Stephen Isaacs is a founding partner of Isaacs/Jellinek, a firm that provides strategic planning, impact assessment, and other consulting services to foundations. An attorney, writer-editor, and former Columbia University professor of public health, Mr. Isaacs edits *To Improve Health and Health Care: The Robert Wood Johnson Foundation Anthology* and *The Robert Wood Johnson Foundation Health Policy Series*. He has written and edited many books and articles, including *The Consumer's Legal Guide to Today's Health Care*, *Salud en América Latina*, *Class: The Ignored Determinant of Health*, and *Human Rights and Reproductive Choice*. A graduate of Brown University and Columbia Law School, Mr. Isaacs spent five years as a program officer with the U.S. Agency for International Development in Thailand, four years as vice president for program planning and evaluation of International Planned Parenthood's Western Hemisphere Region, and 15 years on the faculty of Columbia University.

### **Kerry Jamieson**

Kerry Jamieson is director of communications at the Quantum Foundation and has 15 years' experience in the communications and marketing arena, working with clients, including Unilever, Coca-Cola, and Sara Lee. Ms. Jamieson's role at the foundation includes developing advertising campaigns, social media strategies, corporate and executive writing, and emergency communications. Prior to joining the foundation, Ms. Jamieson worked as a senior communications specialist at Florida Power & Light Company, where she was involved in internal communications for the company's 15,000+ employees and external communications for their 4.6 million customers. Ms. Jamieson has worked with nonprofit organizations, including HIV/AIDS charities in South Africa and through the Junior League in Palm Beach County. Ms. Jamieson attended the University of Miami and the University of California, Los Angeles.

### **Wayne Jonas**

Wayne Jonas is president and CEO of the Samueli Institute, a nonprofit medical research organization supporting the scientific investigation of healing processes and their application in health and disease. He is a widely published scientific investigator, a practicing family physician, professor of family medicine at Georgetown University, and associate professor at the Uniformed Services University of the Health Sciences. Additionally, Dr. Jonas is a retired Lieutenant Colonel in the Medical Corps of the U.S. Army. Dr. Jonas was director of the Office of Alternative Medicine at the National Institutes of Health from 1995 to 1998, and prior to that served as director of the Medical Research Fellowship at the Walter Reed Army Institute of Research. His research has appeared in peer-reviewed journals such as *Journal of the American Medical Association*, *Natural Medicine*, *the Annals of Internal Medicine*, and *The Lancet*. Dr. Jonas received the 2007 America's Top Family Doctors Award, the 2003 Pioneer Award from the American Holistic Medical Association, the 2002 Physician Recognition Award of the American Medical Association, and the 2002 Meritorious Activity Prize from the International Society of Life Information Science in Chiba, Japan. Dr. Jonas

earned his medical degree from Wake Forest University School of Medicine. He currently serves on the editorial boards of eight peer-reviewed journals and on the advisory or scientific boards of six national and international organizations.

### **Chris Kabel**

Chris Kabel serves as the primary program officer for the Northwest Health Foundation's healthy eating/ active living portfolio, the Convergence Partnership Fund, and the Kaiser Permanente Community Fund. In this role, Mr. Kabel works with the foundation's board and the advisory boards of the Kaiser Permanente Community Fund and the Convergence Partnership Fund to design and implement funding initiatives; develop and pursue policy strategies; coordinate the activities of grantees and other community partners to maximize impact; and provide technical assistance, guidance, and support to grantees. Mr. Kabel holds a master of public health degree from Portland State University and a bachelor's degree in print journalism from the University of Southern California. He is past president of the Oregon Public Health Association, and has been recognized by the Center for Effective Philanthropy in their report, *Working With Grantees: The Keys to Success and Five Program Officers Who Exemplify Them*.

### **Michael Kaplan**

Michael Kaplan is president and CEO of AIDS United, a national grantmaking, technical assistance, and advocacy organization dedicated to ending the AIDS epidemic throughout the United States. With more than 20 years of experience in nonprofit leadership, HIV/AIDS, and public health, Mr. Kaplan's past leadership roles have included four years as executive director of Cascade AIDS Project in Portland, Oregon, and eight years managing international HIV/AIDS programs in Washington, DC. From 1992 to 1998, Mr. Kaplan served as the founding executive director of District 202, a Minneapolis-based youth center by and for lesbian and gay youth. Mr. Kaplan served on numerous local and national boards related to HIV and AIDS; lesbian, gay, bisexual, transgender, and queer issues; nonprofit management; and behavioral health care. He holds a bachelor's degree in child psychology and a master's degree in community education from the University of Minnesota.

### **Jenny Kattlove**

Jenny Kattlove directs The Children's Partnership's (TCP) efforts to increase access to dental care for California's children. She also directs TCP's telehealth program and leads efforts related to ensuring access to affordable, comprehensive health insurance for all children in California. Her work includes ensuring that digital opportunities are available to all young people and families, especially those who are low-income and underserved. Before joining TCP, Ms. Kattlove worked as the health advocate for KidsOhio.org and the Children's Defense Fund. In these roles, she led efforts to increase access to health and dental care for low-income children and families through advocacy, coalition building, outreach, and education. Ms. Kattlove received her undergraduate degree from Lewis and Clark College and has a master of science in social administration from Case Western Reserve University.

### **Eric Kelly**

Eric Kelly currently serves as executive vice president of the Quantum Foundation, responsible for directing all program investments and overseeing all grantmaking. Mr. Kelly is a community leader who specializes in strategic planning to ensure that initiatives are sustainable and offer systemic solutions for regional issues. Prior to his current role, Mr. Kelly worked as director of agency relations at the United Way of Palm Beach County and as executive director and then regional vice

president of Allegany Franciscan Ministries. Mr. Kelly received a bachelor of science degree in communications from Florida State University and a master's degree in nonprofit management from Florida Atlantic University.

### **Marcia Kerz**

Marcia Kerz has served 10 years as president of OASIS, a national nonprofit organization that provides opportunities for people over 50 to participate in lifelong learning, health promotion and disease prevention, and volunteer engagement in 41 cities. In 2012 OASIS was named to the Social Impact 100 Index, a list of the top 100 nonprofit organizations in the United States that have broad social impact and deliver results. Ms. Kerz is a member of the American Society on Aging (ASA), served as a delegate to the 2005 White House Conference on Aging, and was a recipient of the 2007 Jack Ossofsky Award from the National Council on Aging for leadership in helping people age successfully through OASIS. OASIS received the 2013 ASA Gloria Cavanaugh Award for Excellence in Training and Education. She holds a master's degree in education from Illinois State University.

### **Christopher King**

Christopher King is assistant vice president of community health for MedStar Health, where he provides programmatic and operational leadership for nine hospitals' community benefit activities. He is also chairman of the board of the Consumer Health Foundation, a Washington, DC-based grantmaker that envisions a region and nation in which everyone has an equal opportunity to live a healthy and dignified life. Prior to joining MedStar Health, Mr. King held a leadership position at Greater Baden Medical Services, the only federally qualified health center in southern Maryland. Mr. King is board certified in health care management and is a fellow of the American College of Healthcare Executives. He is also an adjunct professor in the Health Services Administration Graduate Department at the University of Maryland. Mr. King received his bachelor's degree from East Carolina University, his master of health science from Towson University, and is a doctoral candidate in health services administration at the University of Maryland.

### **James Knickman**

Jim Knickman is the first president and CEO of the New York State Health Foundation (NYSHealth), a private foundation dedicated to improving the health of all New Yorkers, especially the most vulnerable. Under Dr. Knickman's leadership, NYSHealth has invested more than \$80 million in initiatives to improve health care and the public health system in New York State. Prior to joining NYSHealth, Dr. Knickman was vice president of research and evaluation at the Robert Wood Johnson Foundation. Between 1976 and 1992, Dr. Knickman served on the faculty of New York University's Robert F. Wagner Graduate School of Public Service. Earlier, he worked at the New York City Office of Management and Budget, and he has been a visiting professor at the University of Rochester; the University of California, Berkeley; and Princeton University. Dr. Knickman serves as a board member of the National Council on Aging, the Center for Effective Philanthropy, and Philanthropy New York. He is a member of Fordham College's board of visitors, the national advisory committee of the National Resource Center for Participant-Directed Services, and the external advisory committee of the Rutgers Center for State Health Policy. Currently Dr. Knickman is a member of the editorial boards of *The Milbank Quarterly* and *Inquiry*. Dr. Knickman received a bachelor of arts degree in sociology and psychology from Fordham University and a doctor of philosophy in public policy analysis from the University of Pennsylvania.

### **Mary Jane Koren**

Mary Jane Koren is vice president for the Picker/Commonwealth Fund Long-Term Quality Improvement Program and the Dual Eligibles initiative at The Commonwealth Fund. She began her career in geriatrics at Montefiore Medical Center, where she started the geriatrics fellowship program and was assistant medical director for their home care agency. In 1986 Dr. Koren joined the faculty of the Department of Geriatrics at the Mount Sinai School of Medicine and was named associate chief of staff for extended care at the Bronx Veterans Administration Medical Center. She later joined the New York State Department of Health as director of the Bureau of Long-Term Care Services, which oversaw the state's nursing homes and adult day health care programs. Dr. Koren chairs the board for Advancing Excellence: the Long-Term Care Collaborative, and is on the board of the Visiting Nurse Service of New York's CHOICE program. In 2010 she was the recipient of The Terrence Keenan Leadership Award in Health Philanthropy from Grantmakers In Health.

### **Margaret Laws**

Margaret Laws is director of the Innovations for the Underserved program at the California HealthCare Foundation (CHCF). In this role, she oversees the foundation's work to reduce barriers to efficient, affordable care for the underserved. She also created and manages the CHCF Health Innovation Fund, a mission-focused fund investing in companies that improve access to and reduce the cost of health care. Ms. Laws joined the foundation in 1998 after serving as staff to the State of California's Managed Care Improvement Task Force. Prior to that she was a manager with Accenture, where she worked in both the government and health care strategy practices with state health and human service agencies and payer and provider organizations. Ms. Laws has also worked as a consultant with the Francois Xavier Bagnoud Center for Health and Human Rights at the Harvard School of Public Health and for the International HIV/AIDS Alliance, providing technical assistance for nonprofits in developing countries. Ms. Laws' earlier professional positions include working as a consultant for the World Health Organization's Global Programme on AIDS and as a caseworker and analyst for the Commonwealth of Massachusetts Department of Public Welfare. Ms. Laws holds a master's degree in public policy from Harvard University's John F. Kennedy School of Government and bachelor's degree in English literature from Princeton University.

### **Jacquelyn Lendsey**

Jacquelyn Lendsey has two decades of experience managing national and local nonprofits, many of which focus on service to and advocacy on behalf of children, youth, women, and families. More recently, she served as vice president for programs and communications at the DC Children and Youth Investment Trust Corporation. Prior to this, Ms. Lendsey served as president and CEO of EDBuild, a Washington, DC-based nonprofit focused on school modernization and reform; president and CEO of Women in Community Service, a national nonprofit focused on providing transition and support services to women and youth; and as vice president for national public policy and advocacy for Planned Parenthood Federation of America. Ms. Lendsey has served on the boards of directors of Mentors, Inc., Davis Memorial Goodwill, the National Minority AIDS Council, and Planned Parenthood Federation of America, and currently serves on the board of the Consumer Health Foundation. Ms. Lendsey has a bachelor's degree from Adelphi University and a master of education from Howard University.

### **Jonathan Lever**

Jonathan Lever is vice president for health strategy and innovation for YMCA of the USA and a member of its senior leadership team. For more than eight years, Mr. Lever has been a chief

architect and leader of the YMCA's response to the nation's lifestyle health crisis. Mr. Lever's career has been devoted to philanthropy and the nonprofit sector. Prior to joining the YMCA, he was the founding CEO of the Nonprofit Center of Northeast Florida, Inc. Before that, he practiced nonprofit law in Boston where he advised individuals on charitable giving matters and provided counsel to foundations and nonprofits on governance and tax matters. Prior to practicing law, he was a program officer at the Jessie Ball duPont Fund where he directed the foundation's grantmaking to religious institutions. He was also a research associate at Harvard University's Hauser Center for Nonprofit Organizations where he conducted research for *Governing Nonprofit Organizations: Federal and State Law and Regulation*. Mr. Lever has a bachelor's degree in religion from the College of William and Mary, a master's degree in education from Harvard University, and a law degree from Northeastern University.

### **Diane Lewis**

Diane Lewis is executive vice president of ALTA Consulting Group, Inc., a management consulting firm. Ms. Lewis has worked to extend the reach and effectiveness of health systems in under-resourced communities. In 2012 Ms. Lewis was appointed to the DC Health Benefit Exchange Authority. The authority's mission is to ensure access to insurance for individuals and small businesses in the District of Columbia. Ms. Lewis currently serves on the board of House of Ruth, which provides housing and supportive services to women and families impacted by homelessness and violence. Ms. Lewis also served on the board of the Consumer Health Foundation. She graduated with a bachelor's degree in economics from City College of New York and a master's degree in public affairs from the Woodrow Wilson School of Public and International Affairs at Princeton University.

### **Earl Lui**

Earl Lui is a program director at The California Wellness Foundation (TCWF), assigned to grantmaking related to environmental health and work and health. His responsibilities include reviewing letters of interest and grant proposals and making funding recommendations related to those health issues. Prior to joining the foundation in 2006, he was senior attorney at Consumers Union's West Coast Office in San Francisco, focusing on health care advocacy. From 1993 to 2000, he worked on financial services advocacy for Consumers Union. Prior to that, he was an associate trainer for Coro Northern California, a leadership training program; a staff attorney for Homebase (Public Advocates, Inc.); and an associate with the law firm of Pillsbury, Madison & Sutro. Mr. Lui is currently co-chair of the steering committee for the Health and Environmental Funders Network. A member of the State Bar of California, he earned his law degree from the University of Michigan and his bachelor's degree from the University of California, Berkeley.

### **Nicole Lurie**

Nicole Lurie is assistant secretary for preparedness and response at the U.S. Department of Health and Human Services (HHS). In this role, Dr. Lurie serves as Secretary Sebelius' principal advisor on matters related to bioterrorism and other public health emergencies. Prior to joining HHS, Dr. Lurie was senior natural scientist and the Paul O'Neill Alcoa Professor of Health Policy at the RAND Corporation. There she directed RAND's public health and preparedness work, as well as RAND's Center for Population Health and Health Disparities. She previously served in the federal government, as principal deputy assistant secretary of health at HHS; in state government, as medical advisor to the commissioner at the Minnesota Department of Health; and in academia, as professor in the University of Minnesota Schools of Medicine and Public Health. Dr. Lurie attended

college and medical school at the University of Pennsylvania, and completed her residency and master of public health at the University of California, Los Angeles, where she was also a Robert Wood Johnson Foundation clinical scholar. She has served on the council and was president of the Society of General Internal Medicine, and on the board of directors for AcademyHealth. She is the recipient of numerous awards, including the Nellie Westerman Prize for Research in Ethics and the Heroine in Health Care Award, and is a member of the Institute of Medicine.

### **Monica Lyle**

Monica Lyle is a program officer for healthy living at The Colorado Health Foundation. She primarily works to implement one of healthy living's key funding strategies, Healthy Communities, which focuses on the built environment and access to physical activity and healthy food, and community education to promote healthy eating and active living. Prior to joining the foundation, she worked as a research assistant at the Henry Ford Health System in Michigan and the University of Michigan School of Public Health. She also served as an AmeriCorps member with Metro Community Provider Network, a federally qualified health center serving metropolitan Denver, where she implemented clinic-based and school-based health services and education programs for adults, adolescents, and children. Ms. Lyle holds a bachelor of arts degree in human biology from Stanford University and a master of public health degree from the University of Michigan School of Public Health.

### **Shireen Malekafzali**

Shireen Malekafzali, associate director at PolicyLink, works to advance land use, transportation, infrastructure, and economic development policies that promote healthy, equitable communities. She works with community organizers, funders, advocates, public officials, and institutional leaders, advocating for policies, providing technical assistance, conducting research, and managing grantmaking initiatives. Ms. Malekafzali leads a national initiative that provides matching dollars to support innovative grantmaking in the arenas of built environment and food access policies that promote equity and health. Prior to joining PolicyLink, Ms. Malekafzali worked at the San Francisco Department of Public Health on the Health, Equity, and Sustainability team, conducting health impact assessments and advancing healthy built environment policies. She teaches courses at San Francisco State University (SFSU), including health policy, environmental health, and research methods. She holds a master of public health from SFSU and a bachelor of science in environmental studies from University of California, Santa Barbara.

### **David Maurrasse**

David Maurrasse is founder and president of Marga Incorporated, which has been providing strategic advisory services and research to philanthropic initiatives and community partnerships since 2000. Marga Incorporated coordinates the Race and Equity in Philanthropy Group, which improves foundations' policies and practices around racial equity and inclusion. Marga also coordinates the Anchor Institutions Task Force, a network and think tank of leaders of enduring local institutions that promotes the engagement of anchor institutions in economic and community development. Dr. Maurrasse has been affiliated with Columbia University in various faculty and research capacities since 2000. He has also served as an assistant professor at Yale University and senior program advisor at the Rockefeller Foundation. Dr. Maurrasse has published several books, including *Beyond the Campus: How Colleges and Universities Form Partnerships with Their Communities* and *Strategic Public Private Partnerships: Innovation and Development*. He is currently a trustee at Bucknell University.

### **Len McNally**

Len McNally is a program director at The New York Community Trust where he manages the trust's Health and People with Special Needs grantmaking program, including the areas of health policy, biomedical research, aging, environmental health, and AIDS. Prior to joining the trust in 1989, Mr. McNally spent over 10 years planning community-based programs for chronically ill elders and people with AIDS, working to develop a comprehensive capitation-financed program for highly disabled elders and the country's first day treatment program for people with AIDS. Following the terrorist attacks on New York in 2001, Mr. McNally provided consultation to the September 11<sup>th</sup> Fund in the design and funding of environmental health and health insurance programs for victims of the attacks. He has a bachelor's degree and master's degree in biology from Northeastern University and a master of public health from Columbia University. He is a fellow of the New York Academy of Medicine; a board member of Grantmakers In Health; and serves on the advisory committees to the Jonas Center for Nursing Excellence, Hunter College School of Nursing, and the Aging Friendly New York City Commission.

### **Naomi Mezey**

Naomi Mezey is a law professor at the Georgetown University Law Center. She has served on the board of the Consumer Health Foundation since 2007. She received her juris doctor from Stanford Law School where she served as an articles editor for the *Stanford Law Review*. She also has a master's degree in American studies from the University of Minnesota. Her areas of research include law, culture, and the construction of identity. Ms. Mezey served as law clerk for Judge Marilyn Hall Patel of the U.S. District Court for the Northern District of California and, prior to law school, worked on Capitol Hill as a legislative aide to former Senator Alan Cranston.

### **Ann Monroe**

Ann Monroe is president of the Health Foundation for Western and Central New York, an independent private foundation serving the Buffalo and Syracuse regions, focused on improving health outcomes of frail elders and young children in communities of poverty and increasing community health capacity. Ms. Monroe has more than 35 years of experience leading public and private sector programs in mental health, community health, managed care, and philanthropy. She was previously the director of the quality initiative at the California HealthCare Foundation and a senior vice president of Blue Cross of California. She is a member of New York Governor Andrew Cuomo's Medicaid Redesign Team, chair of the Steering Committee of the Western New York Community Health Planning Institute, chair of the Consensus Standards Approval Committee of the National Quality Forum, and a member of the boards of the New York eHealth Collaborative and the national Coalition to Transform Advanced Care.

### **Gayle Ober**

Gayle Ober is executive director of the George Family Foundation where she is responsible for managing all aspects of the grantmaking process, advising and assisting the trustees in meeting their grantmaking goals, and serving as the foundation's first point of contact to the community. Most recently, Ms. Ober was managing director of classical music programming for American Public Media/Minnesota Public Radio (APM/MPR). Prior to joining APM/MPR, she served as director of arts, culture, and entertainment for the City of Saint Paul in Mayor Randy Kelly's administration and was executive director of the Dale Warland Singers. Ms. Ober serves the nonprofit community through her present and past service on a variety of boards and committees, including the Mardag Foundation, Chorus America, Children's Home Society and Family Services, The Saint Paul

Foundation, The Saint Paul Chamber Orchestra, the Minnesota Opera, and others. Ms. Ober holds a master of arts degree in nonprofit management from Hamline University and a bachelor of music degree from the University of Minnesota.

### **Kate O’Malley**

Kate O’Malley is a senior program officer in the California HealthCare Foundation’s (CHCF) Better Chronic Disease Care program, which focuses on improving clinical outcomes and quality of life for Californians with chronic diseases. In this capacity, Ms. O’Malley manages projects focused on care at the end of life. Prior to joining CHCF, she served as a senior project manager for nursing home quality improvement with Lumetra in San Francisco. Her earlier experience includes 20 years with On Lok Senior Health in San Francisco, serving in both clinical and management roles. As a geriatric nurse practitioner, Ms. O’Malley provided care to frail elders in community settings and also served as a Peace Corps volunteer in Kenya. She received a bachelor’s degree in nursing from the University of Rhode Island; a master’s degree in health education from San Francisco State University; and certification as a geriatric nurse practitioner from the University of California, San Francisco. She is also a certified hospice and palliative nurse.

### **Rebecca Onie**

Rebecca Onie cofounded Health Leads (formerly Project HEALTH) in 1996, as a sophomore at Harvard College, along with Dr. Barry Zuckerman at Boston Medical Center. From 1997 to 2000, Ms. Onie served as executive director of Health Leads. At Harvard Law School, she was an editor of the *Harvard Law Review* and continued as co-chair of the Health Leads board of directors. In 2006 Ms. Onie returned as CEO of Health Leads. In 2009 she received a MacArthur “Genius” Fellowship. In 2010 *O! Magazine* named her to its Power List of 20 women who are “changing the world for the better.” Most recently, she was selected for the Gleitsman Citizen Activist Award, which recognizes individuals whose efforts have improved the quality of life in their communities. She has also been named a Robert Wood Johnson Foundation Young Leader, recognizing leadership for a healthier America, and has been included in *Forbes Magazine’s* Impact 30, acknowledging the world’s top 30 social entrepreneurs.

### **Dean Ornish**

Dean Ornish is founder and president of the Preventive Medicine Research Institute and a clinical professor of medicine at the University of California, San Francisco. Dr. Ornish was appointed by President Clinton to the White House Commission on Complementary and Alternative Medicine Policy and was appointed by President Obama to the White House Advisory Group on Prevention, Health Promotion, and Integrative and Public Health. He is the author of six books, including *Dr. Dean Ornish’s Program for Reversing Heart Disease; Eat More, Weigh Less; and Love & Survival*. He is a member of the boards of directors of the San Francisco Food Bank and the J. Craig Venter Institute. Dr. Ornish has received several awards, including the University of California, Berkeley National Public Health Hero Award; the Jan J. Kellermann Memorial Award for distinguished contribution in the field of cardiovascular disease prevention from the International Academy of Cardiology; a U.S. Army Surgeon General Medal; and the Bravewell Collaborative Pioneer of Integrative Medicine Award. Dr. Ornish received his bachelor’s degree in humanities from the University of Texas in Austin, his medical degree from the Baylor College of Medicine, was a clinical fellow in medicine at Harvard Medical School, and completed an internship and residency in internal medicine at the Massachusetts General Hospital.

### **Michele Prichard**

Michele Prichard is the director of Common Agenda at the Liberty Hill Foundation. As Liberty Hill's executive director from 1989 to 1997, she helped create grant programs addressing poverty, racial justice, and environmental health. Liberty Hill is now considered one of the most innovative public foundations in the country for its grantmaking, leadership training, and alliance-building programs. Ms. Prichard has served in a leadership capacity for the California Health and Environmental Funders Network, Los Angeles Urban Funders, the Southern California Association for Philanthropy, the Funding Exchange, and the Working Group on Labor and Community. In 2012 she received the Distinguished Service Award from the Council on Foundations. Ms. Prichard also serves on the board of directors of the Venice Community Housing Corporation and GREEN LA. She was appointed by Mayor Antonio Villaraigosa in 2011 to serve on the board of the Harbor Community Benefit Foundation, a nonprofit dedicated to improving the port communities of Wilmington and San Pedro, California. She has served as a senior fellow at the University of California, Los Angeles School of Public Affairs since 2007, where she earned her master's degree in urban planning.

### **Ria Pugeda**

Ria Pugeda is a program officer at the Consumer Health Foundation (CHF), where she is responsible for CHF's grantmaking and capacity building programs. She is a member of the Health Working Group of the Washington Regional Association of Grantmakers, represents the foundation in the Steering Committee of the Washington AIDS Partnership, and recently joined the Partnership for Prince George's County's Grants Committee and the Funders Concerned About AIDS' Program Committee. Ms. Pugeda worked for a number of years at the Public Welfare Foundation, focusing on advocacy work around health care reform and reproductive and sexual health issues. She also worked at the Eastern Office of the Tides Foundation and the Tides Center and provided services to funder collaboratives and projects.

### **Jasmine Hall Ratliff**

Jasmine Hall Ratliff is a program officer on the Childhood Obesity team at the Robert Wood Johnson Foundation. Her programs include leading the team's New Jersey-focused childhood obesity work and exploring the use of program-related investments to fund childhood obesity prevention initiatives. Prior to joining the foundation in 2008, she was a program officer at the Missouri Foundation for Health. During her time there, she led the Oral Health and Women's Health teams. Ms. Ratliff is vice chair of the Emerging Practitioners in Philanthropy Board of Advisors and was a 2010 Fellow in the Grantmakers In Health Terrance Keenan Institute for Emerging Leaders in Health Philanthropy. She was also a 2006 fellow in the Association of Black Foundation Executives Connecting Leaders Fellowship program. She has presented on childhood obesity and program-related investments at several meetings and has been published in the *Journal of Health Care for the Poor and Underserved*. Ms. Ratliff received her master's degree in health administration from the Saint Louis University School of Public Health and her bachelor of arts from the University of Virginia.

### **Yanique Redwood**

Yanique Redwood is president and CEO of the Consumer Health Foundation (CHF), a regional foundation in Washington, DC, that envisions a region and nation in which everyone has an equal opportunity to live a healthy and dignified life. Prior to joining CHF in 2012, Dr. Redwood was senior associate for health and mental health at The Annie E. Casey Foundation. Before joining the

Casey Foundation, she was an epidemic intelligence service officer working in the National Center for Environmental Health at the Centers for Disease Control and Prevention. Prior to that, she directed a community-based participatory research initiative in Atlanta that was funded by the National Center for Minority Health and Health Disparities. Dr. Redwood received her bachelor's degree from the Georgia Institute of Technology and her master of public health and doctor of philosophy from the University of Michigan School of Public Health. In 2012 she was selected by Grantmakers In Health as a Terrance Keenan Institute Emerging Leader in Health Philanthropy fellow.

### **Christine Reeves**

Christine Reeves is the senior field associate at the National Committee for Responsive Philanthropy (NCRP). NCRP, the nation's only watchdog for grantmaking foundations, promotes socially just philanthropy that serves and empowers marginalized communities. Presenting for funders across the country, Ms. Reeves shares high-impact, results-based funding strategies and engages funders in interactive, dynamic exercises. Beyond NCRP, she has served as a grantmaker for the Funding Exchange Network. Currently Ms. Reeves serves as vice chair of the Emerging Practitioners In Philanthropy DC Chapter. She contributes to two philanthropy blogs: *Keeping A Close Eye* and *LearnPhilanthropy*. Ms. Reeves also published the article "Generalist or Specialist: A False Dichotomy," in *Responsive Philanthropy*. She earned her master's degree from Duke University's Terry Sanford School of Public Policy, where she wrote her master's paper, "Major Trends of International Grant-Making Foundations," for the Robert Wood Johnson Foundation. Ms. Reeves graduated Phi Beta Kappa and magna cum laude from Emory University.

### **Michael Rhein**

Michael Rhein is president and CEO of the Institute for Public Health Innovation (IPHi). Mr. Rhein helped incubate IPhI as senior vice president with CommonHealth ACTION and has directed IPhI's rapid growth into a leading resource for the DC-Maryland-Virginia region, developing public-private partnerships to further innovative public health practice. Previously Mr. Rhein served for nine years with the National AIDS Fund, most recently as vice president for programs. He also managed grantmaking and technical assistance activities for Turning Point: Collaborating for a New Century in Public Health, a high-profile public health systems change initiative funded by the W.K. Kellogg Foundation. Throughout his career, Mr. Rhein has served in intermediary roles helping to translate the resources of government, corporations, and foundations into practical support for communities seeking to improve health and health equity.

### **Sarah Ricketts**

Sarah Ricketts is medical director for behavioral health integration at the Montefiore Care Management Organization, working across Montefiore programs to improve primary care and behavioral health collaboration for Montefiore patients. Dr. Ricketts studied medicine at Columbia University College of Physicians and Surgeons, followed by a medical internship at Bassett Hospital and residency training in psychiatry at the Payne Whitney Clinic of New York Presbyterian Hospital. She spent the next decade at Dartmouth-Hitchcock Medical Center in New Hampshire, where she was director of the Affective Disorders Program and initiated embedded psychiatric care to neurology, internal medicine, breast cancer, and pain services. Upon returning to New York City, she has been the medical director for innovative specialties and outcome measurement at the Office of Mental Health (OMH) at Rockland Psychiatric Center, and was the medical director of the OMH PSYCKES project at New York State Psychiatric Institute from 2008 until 2011. In these roles she

developed and implemented statewide quality improvement projects in mental health. An avid educator, Dr. Ricketts has been involved throughout her career in medical student, residency, and physician training to develop curricula on care integration, quality improvement, and outcomes measurement.

### **Reginald Robinson**

Reginald Robinson is currently a professor of law and the director of the Center for Law and Government at Washburn University School of Law. Mr. Robinson served as president and CEO of the Kansas Board of Regents from 2002 through 2010. Prior to his appointment as CEO, he served as chief of staff to the University of Kansas (KU) chancellor and as a visiting associate professor in the KU School of Law. Professor Robinson joined the U.S. Department of Justice in 1993 as a White House fellow, serving as a special assistant to Attorney General Janet Reno. He then served as deputy assistant attorney general for the Office of Justice Programs (OJP), where he led the attorney general's effort to coordinate the department's involvement in a number of community-based public safety initiatives, including Project Pulling America's Communities Together, Operation Weed and Seed, and the Clinton Administration's Empowerment Zone Initiative. After two years at OJP, Professor Robinson was appointed deputy associate attorney general of the United States. While in law school, he was editor-in-chief of the *University of Kansas Law Review*. Upon graduation, Professor Robinson was a law clerk to Judge Deanell R. Tacha of the U.S. Court of Appeals for the Tenth Circuit. In 1999 President Clinton appointed Professor Robinson to the President's Commission on White House Fellowships.

### **Linda Rosenberg**

Linda Rosenberg is a certified social worker, family therapist, and psychiatric rehabilitation practitioner with more than 30 years of experience in the development, design, and delivery of mental health policy and services. She currently serves as president and CEO of the National Council for Behavioral Health. Under Ms. Rosenberg's leadership, the council has more than doubled its membership; helped secure the passage of the federal mental health and addiction parity law; played a critical role in ensuring that the Affordable Care Act addressed the needs of individuals with behavioral health disorders and expanded financing for integrated behavioral health and primary care services; and built an expansive array of organizational, clinical, and workforce development initiatives. Prior to joining the National Council, Ms. Rosenberg served as senior deputy commissioner of the New York State Office of Mental Health.

### **Brigette Rouson**

Brigette Rouson, principal of Rouson Associates, has worked directly with the Consumer Health Foundation (CHF) board to advance their learning. Ms. Rouson also facilitated a dialogue sponsored by Grantmakers In Health and CHF on HIV/AIDS and women of color. Ms. Rouson has worked to build nonprofit effectiveness toward a just society for over 25 years, and her work includes strategic planning, governance, and leadership development, facilitation, training, and action research. Ms. Rouson's clients include the Praxis Project, Black Women's Health Imperative, DC Health Department, an immigrant-serving health clinic, and an HIV/AIDS case management group. Ms. Rouson led development of the Alliance for Nonprofit Management's Cultural Competency Initiative and coauthored *Embracing Cultural Competency*. Earlier, she directed the Ms. Foundation's young women's leadership grantmaking. Ms. Rouson received her bachelor's degree from Howard University, her juris doctor from Georgetown University, and a master's degree and coursework for a doctor of philosophy from the University of Pennsylvania.

### **Renee Samelson**

Renee Samelson is professor of obstetrics and gynecology at Albany Medical College and has been a member of the Division of Maternal Fetal Medicine since 1990. She has board certification in obstetrics and gynecology and preventive medicine/public health with subspecialty boards in maternal-fetal medicine. In 2006 Dr. Samelson was coeditor of *Oral Health Care during Pregnancy and Early Childhood Clinical Practice Guidelines*, the first document that described guidelines for oral health care during pregnancy. She served as a member of the Institute of Medicine Committee on Oral Health Access to Services, which published *Improving Access to Oral Health Care for Vulnerable and Underserved Populations, 2011*. Recently she participated in the panel that developed the national consensus statement on Oral Health Care during Pregnancy in 2011. Dr. Samelson's high-risk obstetrical practice includes caring for pregnant women with medical problems, obstetrical complications, prepregnancy consultation, prenatal diagnosis, and treatment.

### **Doran Schrantz**

Doran Schrantz is executive director of ISAIAH, a faith-based community organization of 100 member congregations in the Twin Cities metropolitan region, St. Cloud, and Rochester in Minnesota. Ms. Schrantz has been at the center of ISAIAH's development from a small, more locally focused organization of 64 member institutions, to one of the most powerful voices in the state around issues of racial and economic justice. In the past five years, ISAIAH has explored the intersection of community organizing, policy, and research and has launched powerful partnerships with national research and policy leaders. She also launched Healthy Heartlands, a five-state collaborative working at the intersection of the social determinants of health and democracy building to reduce health disparities. In 2012 she was awarded the Young Leader Award from the Robert Wood Johnson Foundation, which recognized 10 leaders under 40 who are innovating around health and health care. Ms. Schrantz is on the board of Human Impact Partners.

### **René Seidel**

René Seidel is vice president of programs and operations and treasurer at The SCAN Foundation. Prior to his current position, Mr. Seidel worked for the Department of Health Services in the County of Los Angeles in a number of positions, including state grants manager for the Office of AIDS Programs and Policy, mental health liaison for the Health Services Administration in the Office of Clinical Affairs and Affiliations, and as director of board relations. Before joining the county in 2001, Mr. Seidel directed health and social services programs in community-based organizations. He served as founder and executive director of the Family AIDS Institute in Salvador, Brazil, and as director of HIV Services at Tarzana Treatment Centers in Los Angeles County. As part of this work, he was appointed to a number of community planning commissions and consortia. Mr. Seidel was one of the founding staff members of the City of West Hollywood Homeless Project. Mr. Seidel graduated from the Polytechnic College for Social Sciences in Munich, Germany, as a social pedagogue.

### **Kathryn Sessions**

Kathryn Sessions is the founding director of the Health and Environmental Funders Network (HEFN), a network of grantmakers working at the intersection of environment and health. She is a regular contributor to *Giving InSight*, HEFN's weekly blog for and about funders focused on health and the environment. Ms. Sessions is a member of the board on environmental studies and toxicology of the National Research Council (NRC) and has served on one NRC review panel. Throughout her career, Ms. Sessions has worked on issues relating to sustainable development,

climate, and civil society issues for philanthropic, nongovernmental, and multilateral organizations. She holds a master's degree in public affairs from the Woodrow Wilson School of Public and International Affairs at Princeton and a bachelor's degree in social studies from Harvard University.

### **Brenda Sharpe**

Brenda Sharpe is president and CEO of the REACH Healthcare Foundation, a 501(c)(3) conversion foundation located in the Kansas City area. As CEO, Ms. Sharpe has led the foundation's development of initiatives and partnerships aimed at achieving large-scale improvements in oral health, mental health, and safety net health care. Through these initiatives, REACH has drawn upon regional and national consultants to advance its health program and policy goals. Ms. Sharpe has served on the Kansas Insurance Commissioner's Health Insurance Exchange and Healthy Kansans 2020 steering committees. She is a member of the Funders Oral Health Policy Group and Kansas Grantmakers in Health, a collaborative effort among five funders. She currently serves on the board of the United Way of Greater Kansas City and Heartland Health, a hospital and health care network. Ms. Sharpe received a bachelor's degree in human development and family studies and a master's degree in student counseling and personnel services at Kansas State University.

### **Lisa Shugarman**

Lisa Shugarman is director of policy for The SCAN Foundation. In this position, she manages both California and national policy activities for the foundation, which aims to transform health care for older adults in ways that encourage their independence and preserve their dignity. Before joining the foundation, Dr. Shugarman was a health policy researcher with the RAND Corporation. During her nine years there, her work focused broadly on the needs of vulnerable populations, including seniors and people with disabilities. Dr. Shugarman has authored some 40 peer-reviewed articles and has taught courses in program evaluation. She is now a member of the editorial board of *Home Health Care Services Quarterly*. She was also a National Institute on Aging Health and Aging Fellow during her graduate training. Dr. Shugarman received a doctoral degree in health services organization and policy from the University of Michigan.

### **Suzie Shupe**

Suzie Shupe currently serves as executive director of California Coverage & Health Initiatives. As a former attorney and First 5 commissioner in Sonoma, California, Ms. Shupe has been active in children's coverage efforts in California for many years. She played an integral role in the formation of Healthy Kids Sonoma County, the Pediatric Dental Initiative of the North Coast, and served as executive director of Family Action of Sonoma County, a community-based child advocacy coalition. Prior to joining California Coverage & Health Initiatives, Ms. Shupe also worked on child health issues as the regional advocacy consultant for United Way of the Wine Country. Before following her passion in child advocacy, she practiced law as a litigator for a law firm in San Francisco. Ms. Shupe has a bachelor's degree in history from Barnard College and received her law degree from the University of California, Los Angeles.

### **Cassidy Smith**

Cassidy Smith is a public policy officer at The Colorado Health Foundation where she works with state and federal policymakers and other key stakeholders to advance the organization's policy priorities, which focus on access to adequate and affordable health coverage, integrated health care services, and healthy eating and physical activity. Ms. Smith has worked in nonprofit, academic, and government settings and has 12 years of experience in community outreach, public health, and

health policy. Prior to joining the foundation, Ms. Smith worked with Colorado's Medicaid director to develop health care delivery and payment reform strategies. Ms. Smith is past president of the Colorado Society for Public Health Education. She earned her master's degree in health policy and administration from the University of Illinois at Chicago School of Public Health and her undergraduate degree from Hendrix College.

### **Laura Smith**

Laura Smith is president and CEO of Washington Dental Service Foundation (WDS). As community advocates for oral health, the WDS Foundation is working to ensure that prevention and early treatment of oral disease, with an emphasis on very young children and seniors, are community priorities. The foundation works with partners to develop and execute innovative solutions that provide lasting improvements to systems of care. Ms. Smith's background includes fundraising and project design with Seattle Children's Hospital and finance and management positions with state and local government. Ms. Smith has an undergraduate degree from Washington State University and a master's degree in public affairs from the Evan's School of Public Affairs at the University of Washington.

### **Lawrence Soler**

Lawrence Soler is president and CEO of the Partnership for a Healthier America (PHA), an organization that works with the private sector and PHA Honorary Chair First Lady Michelle Obama to help end the childhood obesity epidemic. Prior to joining PHA, Mr. Soler was COO for the Juvenile Diabetes Research Foundation where he oversaw fundraising, marketing and communications, information technology, government relations, and international development. He previously worked for eight years in federal relations positions at the Association of American Universities, focusing on education, health, and immigration issues. Mr. Soler received a bachelor's degree from Clark University and his juris doctor from The George Washington University. He is a member of the Maryland and DC Bar Associations.

### **Beatriz Solís**

Beatriz Solís is the director of Healthy Communities, South Region at The California Endowment and is responsible for advancing the vision and strategic direction of the initiative, as well as helping achieve established goals and outcomes through the endowment's philanthropic efforts in Southern California. Prior to joining the endowment, Ms. Solís was an adjunct faculty member at California State University, Northridge, and California State University, Long Beach. She also served as the director of cultural and linguistic services for L.A. Care Health Plan where she was responsible for developing one of the first departments dedicated to cultural and linguistic issues in a managed care setting. Ms. Solís currently serves as a board member the California Family Health Council; advisory committee member for NonProfit Finance Fund; and alumni president for the University of California, Los Angeles (UCLA) School of Public Health. She received her master's degree and doctorate in public health from UCLA's School of Public Health.

### **Gerald Solomon**

Gerald Solomon has served as the Samueli Foundation's executive director since 2008. Prior to joining the foundation, Mr. Solomon served as CEO of Public Health Foundation Enterprises, Los Angeles. Since joining the foundation, he has worked to refine the organization's strategic plan and to establish a secondary operating foundation, the Anaheim Ducks Foundation, aimed at addressing community health disparity issues through sports. Mr. Solomon currently serves on several boards

and committees, including the University of California, Los Angeles School of Engineering Dean's Advisory Council; the University of California, Irvine (UCI) School of Engineering Dean's Advisory Council; UCI's Department of Education Chair's Advisory Committee; and Orange County Roundtable of Funders. Mr. Solomon previously served as president and CEO of several nonprofits and for-profit organizations, including as a civil trial attorney and Judge Pro Tem and as president of a Child Abuse Prevention Foundation, CEO of a multistate residential and outpatient drug and alcohol treatment program, and as executive director of the North Coast Chamber of Commerce in San Diego County.

### **Brenda Solórzano**

Brenda Solórzano is chief program director at the Blue Shield of California Foundation. In addition to her philanthropic background, Ms. Solórzano has extensive experience working on health policy issues, particularly on topics related to health coverage, the health care safety net, and public health issues affecting vulnerable populations in California. As chief program director, Ms. Solórzano is a member of the foundation's Leadership Team and is responsible for leading the strategy, design, evaluation, and management of programmatic and grantmaking activities. Previously Ms. Solórzano was director of the foundation's Health Care and Coverage Program. In this capacity, her responsibilities included developing the grantmaking strategy, leading the proposal review process, building support for policies seeking to address issues of the uninsured, and providing fiscal oversight for the program. Prior to joining the foundation, Ms. Solórzano served as a program officer at The California Endowment and the California HealthCare Foundation and worked for several years in the California healthy policy and advocacy arena. In 2011 Ms. Solórzano was chosen as a Terrance Keenan Emerging Leader in Health Philanthropy fellow. She received her bachelor of arts in history and political science from the University of San Francisco and her juris doctor from Whittier Law School.

### **Margaret Tatar**

Margaret Tatar has been chief of the Medi-Cal Managed Care Division at the Department of Health Care Services since 2012. From 2003 until her appointment with the Department of Health Care Services, Ms. Tatar was executive director of public affairs at CalOptima. She was the planning manager for the Orange County Office on Aging; a staff member at the district office for assembly member Lynn Daucher; and a senior legislative attorney at the Colorado General Assembly, Office of Legislative Legal Services.

### **Alice M. Warner**

Alice Warner is a program officer at the W.K. Kellogg Foundation. As a member of the Food, Health & Well-Being, and Racial Equity teams, she participates in the development of programming priorities, reviews and recommends proposals for funding, manages and monitors a portfolio of active grants, and designs and implements national grants initiatives and multiyear projects. Ms. Warner first joined the foundation in 1997 as a program associate for the Devolution Initiative in Public Policy and later served as a program analyst. She has more than 20 years' experience in her field, including as a consultant for the Institute for Education and Training at Marietta College, director of the Information/Resource Center at Bethesda Hospital and Deaconess Association, instructor and media coordinator at the Jewish Hospital of Cincinnati School of Nursing, medical district health planner at the Veteran's Administration, and special assistant to the president and director of total quality management at Marietta College. She holds a bachelor's degree in psychology and a master's degree in communication from the University of Cincinnati, a master's

degree in health and hospital administration from Xavier University, and a master's degree in organizational development and a doctorate in human and organizational systems from the Fielding Institute.

### **DeAnna Warren**

DeAnna Warren currently serves as executive director of Genesis Community Health Center, a federally qualified health center based in Boynton Beach, Florida. Genesis is a faith-based, nonprofit, primary care organization committed to providing accessible, affordable, and quality service to all members of the community. In her capacity as executive director, Ms. Warren directs the development, strategy, and implementation of the organization's strategic plans, as well as new programs. Prior to joining Genesis, Ms. Warren worked as a health assessment program director and a workforce program director at the Michigan Primary Care Association. She has extensive experience in grant development, as well as public health administration, that especially addresses the health care needs of high-need populations such as low-income, homeless, and migrant populations. Ms. Warren has a bachelor of science degree in biology from Georgia Southern University and is a certified human resources specialist.

### **Tanya Weinberg**

Tanya Weinberg is a program officer at The Colorado Health Foundation. As a member of the Health Care team, she is responsible for grantmaking in areas that include improving the delivery of primary care, increasing the primary care workforce, and implementing health information technology and health information exchange. Prior to joining the foundation, Ms. Weinberg coordinated multiple behavioral health treatment programs serving chronically homeless adults at Denver Health and Hospital Authority. She also has grantmaking and program management experience in the area of developmental disabilities. Ms. Weinberg earned a bachelor's degree from the University of Colorado and a master's degree in social sciences from the University of Chicago.

### **Kristen West**

Kristen West is the Empire Foundation's vice president for grant programs and is responsible for designing and stewarding the investment of foundation resources and staff time to create impact. In her current capacity, she has the opportunity to expand the social justice lens from purely health care access to the foundation's larger health mission. Ms. West has extensive health-related experience as the founder and executive director of CHOICE Regional Health Network, a nonprofit organization that works collaboratively with regional partners to improve the health status of people who live in a five-county region in western Washington State. She is also a founding member of Communities Joined in Action, an officer of the Washington State Coalition, Communities Connect, and a former board member of the Prescription Drug Assistance Foundation. Ms. West has over 15 years' experience working on state health care reform, legislative relations, and public health care purchasing. She holds a master of public administration and bachelor of arts in political science and business administration from The Evergreen State College. She is a recipient of the 2004 Distinguished Leader in Thurston County for her efforts in promoting universal access to health care in the region.

### **Sandra Witt**

Sandra Witt joined The California Endowment in 2011 as director of Healthy Communities North. In this capacity, Ms. Witt is responsible for advancing the vision and strategic direction, as well as helping achieve established goals and outcomes, through the endowment's philanthropic efforts in

northern California. Prior to joining the endowment, Ms. Witt served as deputy director of planning, policy, and health equity for the Alameda County Public Health Department, where she was responsible for ensuring that programs and policies were accurate, effective, and responsive to county residents, and consistent with the goal of eliminating health inequities. Concurrent to that role, she also served as director of the Community Assessment, Planning, Education and Evaluation Unit of the Alameda County Public Health Department for which she developed and directed epidemiologists, evaluators, and health educators who were responsible for assessing and monitoring the health status of residents, and providing technical assistance to county, department, and community programs. In this capacity, she received an Outstanding Manager of the Year award.

### **Tim Wohlgenant**

Tim Wohlgenant is the Colorado and southwest director for the Trust for Public Land (TPL). Since joining TPL in 2007, the Colorado office under Mr. Wohlgenant's leadership, has worked to protect over 23,000 acres with a fair market value of \$65 million, including 14 Denver metro area park projects. Prior to joining TPL, Mr. Wohlgenant was a principal with Western Land Group, Inc., a private consulting firm specializing in public land exchange facilitation. Working in concert with federal and state agencies, he has successfully completed a number of complex, multi-party transactions involving the acquisition of conservation properties throughout the West. Mr. Wohlgenant spent several years at the World Wildlife Fund's RESOLVE Center for Environmental Dispute Resolution in Washington, DC, where he implemented international training projects and facilitated domestic consensus-based mediations. He holds a master's degree from the Yale School of Forestry and Environmental Studies and a bachelor's degree from Brown University.

### **Wendy Wolf**

Wendy Wolf is founding president and CEO of the Maine Health Access Foundation (MeHAF), the state's largest dedicated health philanthropy. MeHAF has awarded over \$47 million to advance public policy and programs such as expanding Maine's community health centers, promoting the integration of primary and behavioral health care, and spearheading the development of Maine's comprehensive statewide health information exchange. As an academic pediatric cardiologist, Dr. Wolf spent two decades providing clinical care, teaching, and conducting research. After receiving a master of public health from the Harvard School of Public Health, she served as senior advisor to the administrators for the Health Resources and Service Administration and the Agency for Healthcare Research and Quality in the U.S. Department of Health and Human Services (HHS). In this capacity she helped guide policy development for the State Children's Health Insurance Program. Dr. Wolf has authored numerous scientific publications, is a nationally recognized speaker on health care policy, and is a recipient of former HHS Secretary Shalala's Award for Distinguished Service.

### **Elisa Wong**

Elisa Wong is a senior program manager for Kaiser Permanente's national Community Health Initiatives, a prevention-driven approach to health, focusing on policy, systems, and environmental changes that promote healthy eating and active living in low-income communities. In her role, Ms. Wong oversees grantmaking to organizations and community coalitions that promote the consideration and integration of health into policies and practices related to land use, transportation, climate change, food production, and food retail at national, state, regional, and local levels. In addition, Ms. Wong manages Kaiser Permanente's efforts to cultivate national partnerships between

health and public health professionals and practitioners from other fields, including land use, planning, transportation, and environmental health.

### **Naima Wong**

Naima Wong joined the Robert Wood Johnson Foundation in 2012 as a program officer. In this capacity she is responsible for the research and evaluation programming in the Public Health portfolio, including building the field of public health services and systems research. Previously Dr. Wong was a senior research associate at the Georgia Health Policy Center at Georgia State University where her work consisted of projects for clients that ranged from community-based organizations to national public health stakeholders. In addition, Dr. Wong was a recipient of the 2010 to 2012 Kaiser Permanente Chris Burch Minority Leadership Award and has research experience in the areas of youth empowerment, health equity, and community-based participatory research methods. She has a doctor of philosophy and master of public health in health behavior and health education from the University of Michigan and a bachelor's degree in psychology from Spelman College.

### **Rick Ybarra**

Rick Ybarra serves as a program officer for the Hogg Foundation for Mental Health. He leads the foundation's integrated health care grant programs and projects portfolio. Mr. Ybarra has over 20 years of clinical and administrative experience in both private and public behavioral health sectors. Prior to joining the Hogg Foundation in 2007, he served as director of diversity initiatives for the Maricopa County Regional Behavioral Health Authority (RBHA) from 2004 to 2007, establishing policy and contract regulations to promote health equity. Prior to Maricopa County RBHA, he served from 1997 to 2003 as director of multicultural services for the Texas Department of Mental Health and Mental Retardation, and has a prior 12-year history working in a variety of clinical and management posts throughout the Texas system. Mr. Ybarra earned both his master's degree in clinical psychology and his undergraduate degree in psychology from Saint Mary's University.

### **Nancy Zions**

Nancy Zions, COO and chief program officer for the Jewish Healthcare Foundation, is responsible for the grant agenda for the foundation and its supporting organizations, Pittsburgh Regional Health Initiative and Health Careers Futures. While at the foundation she has led the planning for a new federally qualified health center, the Squirrel Hill Health Center. Ms. Zions was a board member of Grantmakers In Aging, is a founder of the Coalition for Quality at End of Life, a member of the Task Force For Quality at End of Life in Pennsylvania, and a past board member of Grantmakers of Western Pennsylvania. Ms. Zions has been active in the development and implementation of many of the foundation's initiatives, including its Israel Health Exchange, the Closure and Caregiver Champions Initiatives, Tomorrow's HealthCare, the Champions Programs, the Pennsylvania Health Funders Collaborative, and in the development of such publications as *Aging Environmental Scan*, *Moderating the Effects of Aging: A Caregiver's Manual*, *Health Information Technology Scan*, and *Closure Community Conversations Implementation Guide*. Ms. Zions holds a bachelor of science in chemistry and master of business administration from Concordia University. Prior to joining the foundation, she was employed at Forbes Health System in the areas of planning and continuous quality improvement.

# About GIH

**T**he mission of Grantmakers In Health (GIH) is to help grantmakers improve the health of all people.

Working with over 240 organizations, large and small, both locally focused and national in scope, GIH seeks to build the knowledge and skills of health funders, strengthen organizational effectiveness, and connect grantmakers with peers and potential partners. We help funders learn about contemporary health issues, the implications of changes in the health sector and health policy, and how grantmakers can make a difference.

As the professional home for health grantmakers, our work covers a great deal of territory. We look at health issues through a philanthropic lens, sorting out what works for health funders of different missions, sizes, and approaches to grantmaking. We take on the operational issues with which many funders may struggle in ways that are meaningful to those working in health philanthropy.

GIH generates and disseminates information through meetings, through publications, and on-line; provides training and technical assistance; offers strategic advice on programmatic and operational issues; and conducts systematic studies of the field.

## PROVIDING EXPERTISE ON HEALTH ISSUES

Keeping track of the field requires expert staff and powerful tools. With strong experience in public health, health policy, community work, and philanthropy, GIH's staff members identify trends and emerging issues, develop programs, and provide advice on a broad range of topics from improving access to shoring up the public health infrastructure to building healthier communities.

## OFFERING ADVICE ON FOUNDATION OPERATIONS

GIH examines both fundamental and complex operational issues, such as designing an effective grants program or assessing organizational performance, and puts these in a context that makes sense for those funding in health. Working with new foundations and with more established

## GIH AT A GLANCE

Grantmakers In Health offers:

- events and meetings that provide substantive programming on health and strategic issues, including the Annual Meeting on Health Philanthropy, Fall Forum, The Art & Science of Health Grantmaking, Issue Dialogues, and Strategy Sessions on health topics challenging the field;
- leadership development opportunities, including the Terrance Keenan Institute for Emerging Leaders in Health Philanthropy;
- publications that keep grantmakers up-to-date on current issues and the state of the field, including both quick reads for busy professionals and in-depth reports;
- Web resources at [www.gih.org](http://www.gih.org), including FAQs on operational topics and key issue pages; and
- opportunities for grantmaking colleagues to share and exchange ideas and learn from one another, including audioconference series on health issues and funders networks.

organizations, efforts include:

- *The Art & Science of Health Grantmaking*, a biennial meeting offering introductory and advanced courses on board development, grantmaking, evaluation, communications, and finance and investments;
- sessions focusing on operational issues at the GIH Annual Meeting on Health Philanthropy;
- individualized technical assistance for health funders; and
- a Frequently Asked Questions feature on the GIH Web site.

## CONNECTING HEALTH FUNDERS AND FOSTERING LEADERS AND PARTNERSHIPS

GIH creates opportunities to connect colleagues to each other and with those in other fields whose work has impon-

tant implications for health. GIH meetings, including the Annual Meeting on Health Philanthropy, the Fall Forum (when we focus on policy issues), and Issue Dialogues (intensive one-day meetings on a single health topic) are designed for health funders to learn more about their colleagues' work; talk openly about shared issues; and tap into the knowledge of experts in research, policy, and practice. Audioconference series and Issue Networks offer the chance for smaller groups of grantmakers working on issues of mutual interest, such as health reform, healthy eating/active living, racial and ethnic disparities, or public policy, to meet with colleagues regularly without having to leave their offices.

Understanding the importance of fostering and connecting up-and-coming leaders in the field, GIH created the Terrance Keenan Institute for Emerging Leaders in Health Philanthropy to nurture talented practitioners, to build relationships among this cadre of emerging leaders, and to connect them with established figures. To further nurture ongoing connections among the fellows, GIH periodically convenes them throughout the year.

Collaboration with others is essential to effecting lasting health improvements. Successful collaborations take time, effort, and perseverance. GIH works to facilitate those relationships where there is mutual interest. We bring together national funders with those working at the state and local levels, work with other affinity groups within philanthropy, and help connect grantmakers to organizations that can help further their goals.

GIH also places a high priority on bridging the worlds of health philanthropy and health policy. This is increasingly important as foundations look for ways to address health reform implementation at the national, state, and community levels. Our work includes efforts to help grantmakers understand the importance of public policy to their work and the roles they can play in informing and shaping those policies. Helping policymakers become more aware of the contributions made by health philanthropy and strengthening collaborative relationships between philanthropy and government is also important. Recognizing this, GIH has established cooperative relationships with a number of federal agencies, including the Health Resources and Services Administration, Agency for Healthcare Research and Quality, the Centers for Disease Control and Prevention, and Centers for Medicare and Medicaid Services.

## EDUCATING AND INFORMING THE FIELD

An aggressive publications effort helps GIH reach a large number of grantmakers and provide pertinent resources when funders need them. Our products include both in-depth reports and quick reads. Issue Briefs delve into a single health topic, providing the most recent data, sketching out opportunities for funders, and offering examples of how grantmakers are putting ideas into action. The *GIH Bulletin*, published 12 times each year, keeps funders up to date on new grants, studies, and people. Periodic feature articles include *Grantmaker Focus* (a profile of one of the many foundations and corporate giving programs working in health), *Views from the Field* (written commentaries by health funders), and *Issue Focus* (quick insightful analyses of challenging health issues). GIH's Web site, [www.gih.org](http://www.gih.org), serves as an information resource for health grantmakers and those interested in the field. Key issue pages on access, aging, behavioral health, disparities, health reform, healthy eating/active living, maternal and child health, oral health, public health, public policy strategies, quality, and the social determinants of health provide grantmakers with quick access to new studies, relevant GIH publications, information on upcoming and past audioconferences, and the work of their peers. Monthly e-mail alerts keep Funding Partners up-to-date on new Web site content and upcoming GIH events.

## FOR MORE INFORMATION

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[www.gih.org](http://www.gih.org)

GIH is a 501(c)(3) organization that receives core and program support from more than 240 funders annually. GIH does not give grants or provide assistance in finding grants.

*GIH is committed to promoting diversity and cultural competency in its programming, personnel and employment practices, and governance. It views diversity as a fundamental element of social justice and integral to its mission of helping grantmakers improve the health of all people. Diverse voices and viewpoints deepen our understanding of differences in health outcomes and health care delivery, and strengthen our ability to fashion just solutions. GIH uses the term, diversity, broadly to encompass differences in the attributes of both individuals (such as race, ethnicity, age, gender, sexual orientation, physical ability, religion, and socioeconomic status) and organizations (foundations and giving programs of differing sizes, missions, geographic locations, and approaches to grantmaking).*

# Becoming a **FUNDING PARTNER**

Grantmakers In Health (GIH) is a nonprofit, 501(c)(3) educational organization serving trustees and staff working in health philanthropy. Funding Partners – foundations and corporate giving programs that annually contribute general or program grants – are GIH's primary source of income, supplemented by fees for meetings, publications, and special projects. Over 240 Funding Partner organizations support GIH's efforts to improve the health of all people.

Support from Funding Partners is instrumental in allowing GIH to address the needs of the many grantmakers, both new and established, who rely on us for educational programs, materials, strategic advice, and technical assistance throughout the year. GIH is not a membership organization in that it serves the entire field of health philanthropy, including foundations that do not provide financial support to GIH. Funding Partners, however, do receive special services and benefits that are not available to others:

- **Audioconferences and Webinars:** GIH offers audioconferences and webinars on timely issues of interest to health funders. Active audioconference series include: access, aging, disparities, health reform, health promotion (healthy eating/active living), maternal and child health, mental health/behavioral health, oral health, public health, public policy, quality of care, and social determinants of health.
- **Issue Networks:** GIH offers opportunities for foundation leaders and program staff to convene periodically to discuss strategic issues and share information on more detailed programming challenges and opportunities. Current Issue Networks include: Behavioral Health Funders Network (2009 – present), Complementary and Alternative Medicine Funders Network (2011 – present), Healthy Eating/Active Living Funders Network (2010 – present), Kids' Access Funders Network (2007 – present), Oral Health Funders Network (2009 – present), and Public Health Funders Network (2008 – present).

- **GIH E-Mail Forums:** Moderated by GIH staff, Funding Partners use these forums to pose questions, request technical assistance, solicit feedback, or pass along relevant articles or announcements to colleagues. Active forums include the GIH Behavioral Health Funders Network E-Mail Forum, the Health Reform E-Mail Forum, and the Kids' Access Funders Network E-Mail Forum.
- **Reduced Meeting Fees:** Funding Partners attend the Annual Meeting on Health Philanthropy, Fall Forum, The Art & Science of Health Grantmaking, and other national meetings at substantially reduced rates.
- **Invitation Only Events:** Funding Partners are given preferential access to forums such as Issue Dialogues, strategy sessions, site visits, and other special events (no registration fee).
- **Technical Assistance:** GIH staff prioritizes Funding Partner requests for strategic guidance and technical assistance through the Support Center for Health Foundations and the Resource Center on Health Philanthropy.
- **GIH Bulletin and E-Alert:** The *GIH Bulletin* is a monthly newsletter containing up-to-date information on new grants, publications and studies, and people in the field. Funding Partners are eligible to have their institutions profiled, and their submissions are given priority placement. *GIH E-Alerts* are published monthly and contain information on GIH programming, products, and other items of interest to grantmakers.

Recommended levels of support are based upon foundation assets and giving patterns, and is commensurate with requests to foundations of similar structure and size.

## **FUNDING PARTNER ELIGIBILITY**

GIH limits Funding Partner status to organizations whose primary function and activity is charitable grantmaking to multiple individuals or organizations. The following types of

organizations are eligible to become Funding Partners:

- **Private Foundation:** A nongovernmental, nonprofit organization with funds (usually from a single source, such as an individual, family, or corporation) and programs managed by its own trustees or directors, established to maintain or aid social, educational, religious, or other charitable activities, primarily through grantmaking (validation: Form 990-PF).
- **Operating Foundation:** A private foundation that uses the bulk of its income to provide charitable services or to run charitable programs of its own (validation: Form 990-PF).
- **Community Foundation:** A tax-exempt, nonprofit, independent, publicly supported, philanthropic institution organized and operated primarily as a permanent collection of endowed funds for the long-term benefit of a defined geographic area (validation: Form 990 or Form 1023 and IRS determination letter).
- **Corporate Giving Program:** A grantmaking program established and administered within a profit-making company. Gifts and grants go directly to charitable organizations from the corporation (validation: annual report and general giving guidelines of parent company).
- **Company/Corporate Foundation:** A private foundation that derives its grantmaking funds primarily from the contributions of a profit-making business. A corporate foundation is a separate, legal organization from the donor company and is subject to the same rules and regulations as other private foundations. Gifts and grants are usually made on a broad basis although not without regard for business interests of the corporation (validation: Form 990-PF or Form 1023 and IRS determination letter).
- **Public Foundation:** A tax-exempt, nonprofit, independent organization that receives its assets from multiple sources, which may include private foundations, individuals, government agencies, and fees for services. Although public foundations may provide direct charitable services to the public as other nonprofits do, their primary focus is on grantmaking. To qualify as a GIH Funding Partner, at least 50 percent of the operating budget of a public foundation must be for grants. These grants may not include awards to affiliate chapters or organizations (validation: Form 990 or Form 1023 and IRS determination letter).
- **Bank, Trust Company, Donor Service:** For-profit companies that manage philanthropic funds. In addition to providing legal and fiduciary support, these professional organizations counsel clients on the formation of charitable entities and can serve as trustees in managing the implementation of grantmaking programs. Once the fund itself is only eligible to become a Funding Partner, not the for-profit management firm. Staff from the managing organization who function as staff of the fund are eligible to receive Funding Partner benefits (validation: verification in writing of the professional firm's activities in managing the charitable trust or foundation and the size of the fund's assets).
- **Government Agencies:** Federal and state government agencies that fund GIH projects and programs (validation: signed notice of grant award or signed cooperative agreement for each project).

GIH may request documentation to validate organization type.

#### **FOR MORE INFORMATION CONTACT:**

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# Funding Partners

GIH relies on the support of Funding Partners—foundations and corporate giving programs that annually contribute to core and program support—to develop programs and activities that serve health philanthropy. Their support, supplemented by fees for meetings, publications, and special projects, is vital to our work in addressing the needs of grantmakers who turn to us for educational programming, information, and technical assistance throughout the year.

Aetna Foundation, Inc.  
The Alaska Mental Health Trust Authority  
Allegany Franciscan Ministries, Inc.  
Alliance Healthcare Foundation  
Altarum Institute  
Altman Foundation  
The Jenifer Altman Foundation  
Archstone Foundation  
The Assisi Foundation of Memphis, Inc.  
The Atlantic Philanthropies, Inc.  
Augusta Health Foundation  
Baptist Community Ministries  
Battle Creek Community Foundation  
The Baxter International Foundation  
S.D. Bechtel, Jr. Foundation  
Claude Worthington Benedum Foundation  
BHHS Legacy Foundation  
Mary Black Foundation  
Jacob and Hilda Blaustein Foundation  
The Blowitz-Ridgeway Foundation  
Blue Cross and Blue Shield of Florida  
Foundation  
Blue Cross and Blue Shield of Minnesota  
Foundation  
Blue Cross Blue Shield of Louisiana  
Foundation  
Blue Cross Blue Shield of Massachusetts  
Foundation  
Blue Cross Blue Shield of Michigan  
Foundation  
Blue Shield of California Foundation  
BlueCross BlueShield of North Carolina  
Foundation  
The Boston Foundation  
The Bower Foundation  
Brandywine Health Foundation  
Bristol-Myers Squibb Foundation, Inc.  
The Morris & Gwendolyn Cafritz  
Foundation  
The California Endowment  
California HealthCare Foundation  
The California Wellness Foundation  
Cambia Health Foundation  
The Cameron Foundation  
Cape Fear Memorial Foundation  
Cardinal Health Foundation  
CareFirst BlueCross BlueShield  
Caring for Colorado Foundation  
The Annie E. Casey Foundation  
CDC Foundation  
The Centene Foundation for Quality  
Healthcare  
Centra Foundation  
Central Susquehanna Community Foundation  
Children's Fund of Connecticut  
Children's Hospital of Michigan Foundation  
CIGNA Foundation  
Clark Regional Foundation for the Promotion  
of Health, Inc.  
The Cleveland Foundation  
The Colorado Health Foundation  
The Colorado Trust  
Columbus Medical Association Foundation  
The Commonwealth Fund  
Community Memorial Foundation  
Community West Foundation  
Comprehensive Health Education Foundation  
Con Alma Health Foundation, Inc.  
Cone Health Foundation  
Connecticut Health Foundation

Consumer Health Foundation  
The Jessie B. Cox Charitable Trust  
The Nathan Cummings Foundation  
Daughters of Charity Foundation of St. Louis  
Deaconess Foundation  
de Beaumont Foundation  
Ira W. DeCamp Foundation  
Delta Dental of Colorado Foundation  
Delta Dental of Minnesota Foundation  
DentaQuest Foundation  
The Duke Endowment  
East Bay Community Foundation  
Empire Health Foundation  
Endowment for Health  
EyeSight Foundation of Alabama  
Richard M. Fairbanks Foundation, Inc.  
The Fine Foundation  
First Hand Foundation  
First Hospital Foundation  
Ethel & James Flinn Foundation  
Ford Foundation  
Foundation for a Healthy Kentucky  
The Foundation for Community Health  
Foundation for the Advancement of  
Midwifery  
Lloyd A. Fry Foundation  
George Family Foundation  
The Rosalinde and Arthur Gilbert Foundation  
GRACE Communications Foundation  
Grant Healthcare Foundation  
Greater Milwaukee Foundation  
Greater Rochester Health Foundation  
Green Tree Community Health Foundation  
The Greenwall Foundation  
The George Gund Foundation  
The Irving Harris Foundation  
The John A. Hartford Foundation, Inc.  
Harvard Pilgrim Health Care Foundation  
The Harvest Foundation  
Health Care Foundation of Greater Kansas  
City  
The Health Foundation of Central  
Massachusetts, Inc.  
The Health Foundation of Greater Cincinnati  
The Health Foundation of Greater  
Indianapolis, Inc.  
Health Foundation for Western and Central  
New York  
Health Foundation of South Florida  
The Health Trust  
The Healthcare Foundation of New Jersey

Healthcare Georgia Foundation, Inc.  
Healthcare Initiative Foundation  
The HealthPath Foundation of Ohio  
Lotte & John Hecht Memorial Foundation  
The Leona M. and Harry B. Helmsley  
Charitable Trust  
Highmark Foundation  
Conrad N. Hilton Foundation  
HJW Foundation  
HNHFoundation  
Hogg Foundation for Mental Health  
The Horizon Foundation  
Houston Endowment Inc.  
Illinois Children's Healthcare Foundation  
Irvine Health Foundation  
The Jasper Foundation  
The Jenkins Foundation  
Jewish Healthcare Foundation  
Johnson & Johnson  
Robert Wood Johnson Foundation  
K21 Health Foundation  
The Henry J. Kaiser Family Foundation  
Kaiser Permanente  
Kansas Health Foundation  
W.K. Kellogg Foundation  
The Kresge Foundation  
L.A. Care Health Plan  
Legacy  
The Jacob & Valeria Langeloth Foundation  
The Lutheran Foundation  
Josiah Macy, Jr. Foundation  
Maine Health Access Foundation  
Marisla Foundation  
Markle Foundation  
Maternal and Child Health Bureau, Health  
Resources and Services Administration  
Mat-Su Health Foundation  
The Faye McBeath Foundation  
Ronald McDonald House Charities  
McKesson Foundation  
Medica Foundation  
The Merck Company Foundation,  
Methodist Healthcare Ministries of South  
Texas, Inc.  
MetLife Foundation  
MetroWest Health Foundation  
Metta Fund  
The Michelson Family Foundation  
Mid-Iowa Health Foundation  
Milbank Memorial Fund  
Missouri Foundation for Health

Gordon and Betty Moore Foundation  
The Margaret Clark Morgan Foundation  
Ruth Mott Foundation  
The Mt. Sinai Health Care Foundation  
John Muir/Mt. Diablo Community Health Fund  
National Center for Creative Aging  
Nemours  
New England Healthcare Institute  
New Hampshire Charitable Foundation  
The New York Community Trust  
New York State Health Foundation  
Nokomis Foundation  
North Penn Community Health Foundation  
Northern Virginia Health Foundation  
Northwest Health Foundation  
Obici Healthcare Foundation  
Oklahoma Tobacco Settlement Endowment Trust  
The David and Lucile Packard Foundation  
Lucile Packard Foundation for Children's Health  
Palm Healthcare Foundation, Inc.  
Partners for Health  
Partners HealthCare  
Paso del Norte Health Foundation  
Patient-Centered Outcomes Research Institute  
The Pew Charitable Trusts  
Pfizer Inc. and Pfizer Foundation  
Phoenixville Community Health Foundation  
Piedmont Health Foundation  
Polk Bros Foundation  
The Dorothy Rider Pool Health Care Trust  
Portsmouth General Hospital Foundation  
Potomac Health Foundation  
Pottstown Area Health & Wellness Foundation  
Prime Health Foundation  
Public Health Fund  
Quantum Foundation  
The Rapides Foundation  
RCHN Community Health Foundation  
REACH Healthcare Foundation  
Michael Reese Health Trust  
The Retirement Research Foundation  
John Rex Endowment  
The Kate B. Reynolds Charitable Trust  
The Rhode Island Foundation  
Richmond Memorial Health Foundation  
Fannie E. Rippel Foundation

Riverside Community Health Foundation  
The Rockefeller Foundation  
Rose Community Foundation  
St. David's Foundation  
St. Joseph Community Health Foundation  
St. Luke's Episcopal Health Charities  
Saint Luke's Foundation of Cleveland, Ohio  
St. Luke's Health Initiatives  
Salem Health & Wellness Foundation  
Samueli Foundation  
The San Francisco Foundation  
The SCAN Foundation  
Sierra Health Foundation  
Sisters of Charity Foundation of Canton  
Sisters of Charity Foundation of Cleveland  
Sisters of Charity Foundation of South Carolina  
Sisters of Saint Joseph Charitable Fund  
Richard and Susan Smith Family Foundation  
The Barbara Smith Fund  
The Special Hope Foundation  
The Otho S.A. Sprague Memorial Institute  
The Staten Island Foundation  
Staunton Farm Foundation  
Sunflower Foundation: Health Care for Kansans  
Doree Taylor Charitable Foundation  
Tides Foundation  
Tufts Health Plan Foundation  
UniHealth Foundation  
United Health Foundation  
United Hospital Fund  
United Methodist Health Ministry Fund  
Universal Health Care Foundation of Connecticut, Inc.  
Virginia Health Care Foundation  
Washington Dental Service Foundation  
Washington Square Health Foundation, Inc.  
The Harry and Jeanette Weinberg Foundation, Inc.  
Welborn Baptist Foundation, Inc.  
WellPoint Foundation  
Wellspring Advisors, LLC  
Westlake Health Foundation  
Jesse Parker Williams Foundation, Inc.  
Williamsburg Community Health Foundation  
Winter Park Health Foundation  
Wyandotte Health Foundation



## Terrance Keenan Institute for Emerging Leaders in Health Philanthropy

The Terrance Keenan Institute for Emerging Leaders in Health Philanthropy (TK Institute) was established in 2010 to honor grantmakers whose work embraces the values and vision Terry Keenan set for himself and the field. The TK Institute is a living legacy through which Keenan's words and deeds continue to inspire future leaders in the field.

Designed to nurture the next generation of leaders in the field of health philanthropy, the TK Institute seeks to build relationships among emerging leaders and connect them with established figures in the field. Programming emphasizes leadership development, mentoring, and building collegial connections that can endure throughout participants' careers. It also emphasizes creativity and risk taking in responding to communities' needs and forging permanent improvements in health.

Fellows begin their institute experience with a two-day retreat emphasizing leadership development, mentoring, and building connections. It includes both large- and small-group discussions and provides time for networking. Programming for fellows continues at the GIH Annual Meeting on Health Philanthropy with special preconference and breakout sessions.

TK Institute activities also reach beyond in-person meetings to conference calls and webinars exploring critical issues facing the field. Fellows present their ideas and visions for the future of philanthropic leadership in articles published in the *GIH Bulletin*.

The TK Institute and its goals have resonated throughout the field of health philanthropy. It has begun to meet the critical need for strengthening the skills of future leaders; providing career development opportunities; and building a network of young, talented foundation staff.

### 2010 Terrance Keenan Institute Fellows

Melinda Abrams, The Commonwealth Fund

Veenu Aulakh, Center for Care Innovations (formerly with California HealthCare Foundation)

Matthew Barnes, Families Empowered (formerly with Houston Endowment, Inc.)

Allison Bauer, The Boston Foundation

Saba Brelvi (formerly with The California Wellness Foundation)

Phillip Gonzalez, Community Catalyst (formerly with Blue Cross Blue Shield of Massachusetts Foundation)

Anu Gupta, Johnson & Johnson

Amy Stringer Hessel, Missouri Foundation for Health

Kathryn Keller, The Health Foundation of Greater Cincinnati

Elizabeth Krause, Connecticut Health Foundation

Jacqueline Martinez, New York State Health Foundation

Sandra Martínez, The California Wellness Foundation

Jasmine Hall Ratliff, Robert Wood Johnson Foundation

Brenda Solórzano, Blue Shield of California Foundation

Kim VanPelt, St. Luke's Health Initiatives

Edgar Villanueva, Marguerite Casey Foundation (formerly with The Kate B. Reynolds Charitable Trust)

Rachel Wick, Consumer Health Foundation

2012 Terrance Keenan Institute Fellows

David Adler, Robert Wood Johnson Foundation

Cecilia Echeverría, Kaiser Permanente (formerly with Blue Shield of California Foundation)

Kim Firth, Endowment for Health

Colleen Lampron, Delta Dental of Colorado Foundation

Jennifer Lee, Blue Cross Blue Shield of Massachusetts Foundation

Corina Lindley, Kaiser Permanente Colorado

Andy Miller, Lance Armstrong Foundation

Yanique Redwood, Consumer Health Foundation (formerly with The Annie E. Casey Foundation)

Timothy Rourke, New Hampshire Charitable Foundation

Alyse Sabina, Aetna Foundation, Inc.

Janisse Schoepp, Health Foundation of South Florida

Sarah Senseman, Blue Cross and Blue Shield of Minnesota

Lisa Shugerman, The SCAN Foundation

Amber Slichta, Health Foundation for Western and Central New York

Rachel Watman, The John A. Hartford Foundation, Inc.

Liane Wong, The David and Lucile Packard Foundation



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# Coming Events

## Using Apps and Social Media to Promote Health

### Strategy Session

April 11, 2013 (tentative), Washington, DC

Supported by the Aetna Foundation, Inc., this strategy session will convene funders from across the country to discuss current and potential programs that focus on the use of mobile apps and social media in the field of health. The meeting is designed to provide ample opportunities to engage in active dialogue about the issues and funders' roles in supporting this work, including the types of mobile apps and social media platforms being used to successfully improve the health of individuals and communities; the range of activities, target populations, and sites where these apps and social media are being used; how these apps and social media are reaching different populations; and the challenges, opportunities, and strategies for funder support and investment. *Space is limited for this invitational meeting.*

## Innovative Crossroads: The Intersection of Creativity, Health, and Aging

### Strategy Session

Le Meridian Hotel and The Kreeger Museum

May 1, 2013, Washington, DC

GIH is partnering with the National Center for Creative Aging, Grantmakers In Aging, Grantmakers in the Arts, and the Society for the Arts in Healthcare to host a meeting that will not only explore what the research and data tell us about the promise of arts and other creative programs for the health and well-being of older Americans, but also the various types of promising programs already being put into practice. Using this information, funders will engage in active dialogue with each other and experts around the issues and foundations' roles in supporting this work. *Space is limited for this invitational meeting.*

## Latinos and Health Care: Assets and Opportunities in the South

### Strategy Session

May 10, 2013, Palm Beach County, Florida

This dynamic strategy session will focus on maximizing the unique health care opportunities for the Latino community in the South by informing funders about the demographic implications of this population, learning lessons from other foundations on reaching and engaging Latinos, identifying ways to increase access to care for Latinos through the Affordable Care Act and the safety net, and exploring ways to leverage Latino talent in the health care workforce. *Space is limited for this invitational meeting.*

## **Call for Sessions: 2014 Annual Meeting on Health Philanthropy**

**Deadline for submissions: June 2013**

The Call for Sessions provides an opportunity for grantmakers to get involved in GIH and ensures that the content of the annual meeting addresses issues most relevant to attendees. We encourage submissions that highlight successful grantmaking programs and strategies or that raise challenging issues confronting the field. We look forward to exciting sessions designed by you and your peers. Additional information will be available in May.

### **National Alliance for Health Equity Strategy Session**

**June 13, 2013, Chicago, Illinois**

This strategy session, funded by the Missouri Foundation for Health, will explore emerging issues facing health equity grantmakers. *Space is limited for this invitational meeting.*

### **Integrating LGBT Health in Health Equity Grantmaking Strategy Session**

**Gleacher Center, University of Chicago**

**June 14, 2013, Chicago, Illinois**

Through support from Wellspring Advisors, GIH will host a strategy session focused on approaches for integrating a specific emphasis on lesbian, gay, bisexual, and transgender (LGBT) health within a foundation's health equity grantmaking strategy. The session will help foundation staff identify and build key skills related to making a strong case to foundation leadership for elevating LGBT health. *Space is limited for this invitational meeting.*

### **Call for Nominations: GIH Board of Directors**

**Deadline for submissions: September 2013**

GIH seeks interested, experienced grantmakers who are willing to commit their energy and talents to further GIH's mission and vision by serving on its board of directors. We hope to attract a pool of potential candidates who represent the demographic, geographic, and funding diversity of the field. If you are interested in being considered for board service or would like to recommend someone else, contact GIH Vice President for Program and Strategy Osula Rushing. Nomination materials will be available in June.

### **Call for Nominations: The 2014 Terrance Keenan Leadership Award in Health Philanthropy**

**Deadline for submissions: September 2013**

The Terrance Keenan Leadership Award annually recognizes a grantmaker whose leadership and thoughtful application of philanthropic dollars have forged permanent improvements in health through innovation, risk taking, and boldness. The award recipient's achievements exemplify responsiveness to people in communities, with a particular emphasis on reaching those most in

need. Do you know someone who fits this description? If so, we want to hear from you. Contact GIH Senior Program Associate Kate Treanor. Nomination materials will be available in June.

## **2013 Fall Forum**

**The Washington Court Hotel**

**October 24-25, 2013, Washington, DC**

Save the date for the GIH Fall Forum, the time each year when we focus specifically on the intersection of health policy and health philanthropy. The first day of the program will include a daylong meeting on foundations and health reform, followed by the inaugural Lauren LeRoy Lecture Series and an evening reception. The second day of the program will feature a special workshop on advocacy strategies.

## **2014 Annual Meeting on Health Philanthropy**

**Intercontinental Buckhead Atlanta**

**March 5-7, 2014, Atlanta, Georgia**

The largest gathering of health grantmakers in the nation, GIH's Annual Meeting on Health Philanthropy focuses attention on the practice of philanthropy, highlighting innovative strategies and approaches to deal with contemporary issues. It is an opportunity for the grantmaking community to learn from outside experts, as well as philanthropic leadership, and to exchange information, ideas, and insights with colleagues on strategies and best practices.



## Upcoming Publications

### *Start Smart: Healthy Weight in Early Childhood*

A GIH Issue Brief

March 2013

As part of its continuing mission to serve trustees and staff of health foundations and corporate giving programs, GIH convened a group of grantmakers, researchers, and practitioners in October 2012 for a discussion on healthy weight in early childhood. This Issue Brief synthesizes key points from the day's discussion with a background paper previously prepared for Issue Dialogue participants.

### *Better Care for the Neediest: The Critical Transformation*

A Fall Forum Monograph

Coming Spring 2013

At the 2012 GIH Fall Forum, members of the health philanthropy community engaged with health policymakers and leaders from the frontlines of health care delivery to tackle the problem of how to produce better health and health care for the neediest and most vulnerable patients. This monograph distills some of the main messages, ideas, and arguments presented in those discussions.

### *Investing in Opportunities and Assets: Lessons from the South for the Nation*

A GIH Meeting Report

Coming Spring/Summer 2013

GIH convened philanthropic, civic, academic, and nonprofit leaders in New Orleans in September 2012 to discuss challenges and opportunities for philanthropy to promote health and equity in the South. This paper summarizes key themes and ideas that surfaced in the meeting, and identifies promising approaches for building the capacity of the nonprofit sector to promote the health of vulnerable communities in the South.

### *Opportunities to Maximize Women's Health under the Affordable Care Act*

A GIH Report

Coming Spring/Summer 2013

While state and federal governments are focused on myriad complex issues that need to be addressed in reforming the U.S. health care system under the Affordable Care Act, philanthropy is uniquely situated to focus on and address the challenges specific to women's health. This report identifies opportunities for philanthropy, gleaned from six years of Massachusetts health reform.