2007 Annual Report

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Physicians and other practitioners have long known that research studies infrequently involve older adults, especially those with chronic diseases or issues with activities of daily living (ADLs), and often lack data specific or relevance to geriatrics. Those who established the AMDA Foundation realized that they could do much to bridge this gap. The Foundation leaders—then and today—have undertaken the mission to ensure that research addresses geriatrics and uncovers information about practices and attitudes about diseases of aging that can be translated into quality patient care.

Today, the AMDA Foundation continues to move the long term care research agenda forward through studies, conferences, awards, articles and posters, and other initiatives. The organization carefully identifies and pursues projects that are specific to our mission and that address the long term care research needs of physicians nationwide.

During the past year, the Foundation not only completed important projects; it also pursued new grants and research opportunities, as well as undertaking some strategic planning for the future.
"YOU CAN NOT DO ALL THE GOOD THE WORLD NEEDS, BUT THE WORLD NEEDS all the good YOU CAN DO.“ -ANONYMOUS

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Message from the Chair

“THE VERY essence of leadership IS THAT YOU HAVE TO HAVE VISION. YOU CAN’T BLOW AN UNCERTAIN TRUMPET.”

- THEODORE M. HESBURGH

Every so often, organizations must take an objective, hard look at themselves and reexamine their goals, mission, and ideals. This can be challenging and difficult, but it is necessary to grow and prosper. By looking at what makes the organization what it is and where it needs to go enables leaders to plot a course for future success.

In 2007 the Foundation began a strategic planning process that helped us grow as a board. It also enabled us to reevaluate our mission and goals and plot out a strong course for our future that better emphasizes our strengths and our commitment to you the AMDA membership-- and to long term care. I wish to thank the AMDA Foundation Board of Directors, Foundation Executive Director Gwendolyn Maddox, the AMDA Board of Directors (specifically, Alva “Buzz” Baker, MD, CMD and Charles Crecelius, MD, CMD), AMDA Executive Director Lorraine Tarnove, the AMDA Foundation staff, the AMDA staff, and the AMDA membership for their help and support of the Foundation during this planning process.

The strategic plan will be finalized shortly, and we will discuss the results in the Foundation e-News, AMDA Reports, and other sources throughout the year. In the meantime, I would like to take this opportunity now to highlight some of our key goals and objectives.

Because of our commitment to research and education of future professionals we have revised our mission, vision and goals as follows:

Mission

The AMDA Foundation advances excellence and innovation in the long term care continuum through research and its translation into practice. The Foundation educates and inspires future long term care professionals.

Vision

Advancing high quality, innovative practice along the long term care continuum.
We also realize the importance of educating and mentoring future long term care professionals and have therefore committed to enhance, refine and expand the Futures program.

A few other objectives include hiring a fundraiser to increase the breadth and depth of our fundraising, establishing a research agenda in line with the AMDA membership needs, and strengthening our communication with the AMDA leadership, AMDA members, and the public.

The year 2007 has been a year of change for the Foundation and 2008 will be a year of transition for the Research Network. During the 2008 Annual Symposium, Research Network Director Stefan Gravenstein, MD, MPH, CMD, will conduct an all-day strategic planning and educational session with Research Network leadership and members. The purpose will be to understand the needs of the Network and, in so doing, be able to better engage the Network, the AMDA membership, and other professionals working in the long term care continuum in future research projects. This is an important step towards our goal of developing a grassroots Research Network that will be able not only to contribute to a relevant research agenda for the Foundation but also will help us participate in various studies.

I would like to thank Dr. Gravenstein for his leadership of the Research Network and the plans he has in place to move the Foundation’s research program forward during 2008. I am very excited that we will be able to outline concrete goals and objectives for the Research Network.

Of course, 2007 has not been a stagnant year for research by any means. This year marks the end of a very important study – the AHRQ Long Term Care Quality Improvement Partnership Study. I want to thank the numerous individuals who developed and participated in the study. The manuscripts will be submitted to JAMDA shortly, and we look forward to seeing the published results. I wish to personally thank Dr. David Polakoff for all of his hard work as principal investigator on the project.

Additionally, we received funding and IRB approval for two new studies--the LifeScan and VeriMed studies, which are now ready to start recruitment. We also have several other proposals in our pipeline that are in the final stages of approval. We have discussed the possibilities and opportunities of expanding the Research Network with the inclusion of other non-physician health care professionals, and it is likely to result in additional studies in the coming years.

The Futures program continues to be one of the Foundation’s top priorities. It is an intensive learning experience designed to expose residents and fellows to the numerous career opportunities available in long term care. Many past participants...
have joined the ranks of AMDA and they have sought out careers in long term care medicine. I am proud to note that the Futures program was once again a highlight of this year’s Annual Symposium. Fifty-nine enthusiastic residents and fellows from across the country participated in the 2007 program. I would like to thank the Futures Co-chairs Cari Levy, MD, CMD, and Heidi White, MD, CMD, for their dedication, time, and leadership. I would also like to thank Janssen Scientific Affairs, LLC and Johnson & Johnson Health Care Systems for their generous donation to the Futures program.

While the Wall of Caring continues to be a popular staple of our fundraising efforts, our newest activity—the "Art of Caring - Works of heART" Art Auction—has been tremendously successful. The 2007 auction was a HUGE success, raising over $21,000. We received dozens of incredible pieces of art donated from facility residents, AMDA members, and other friends of the Foundation. We are pleased and excited about the results of this year’s auction and hope that you will continue to support this important fundraising event. All donations go to help support long term care research.

Awards continue to be an important part of the Foundation’s efforts. The AMDA Foundation/Pfizer Quality Improvement Award program continues to attract talented individuals who develop important projects designed to improve the quality of care of residents in their respective facilities. I am happy to report that we received 25 submissions for the 2007 program; and three winners were announced at the 2007 AMDA Annual Symposium General Session. Each winner received between a $10,000 and $15,000 award. I wish to thank all of the individuals who took the time to submit for this award. I would also like to thank Leslie Libow, MD, CMD, and the panel of judges who reviewed all of the applications and chose the awardees. I also wish to thank Pfizer for its continued generous support for this very important award program.

Elsewhere, we have added the AMDA Foundation/Evercare® Awards as a new and exciting award program. It recognizes innovative programs in nursing homes that improve the quality of life of their residents. Each of three selected programs will receive a $10,000 award. Winners will be announced during the 2008 Annual Symposium.

I am very happy to report that we ended the fiscal year 2007 with a positive net balance. Donations were higher than originally projected, although grant dollars were lower than projected. However, expenses were also lower than expected,
which helped to contribute to our positive bottom line. Additionally, we have opened new bank accounts that will offer more competitive rates; and we recently approved placing some of our funds in a CD account.

Clearly, this has been a very exciting and transformational year as we plot a course for the future. The Foundation continues to adapt to the changing climate in long term care and to the decrease in funding opportunities. Hiring Dr. Gra-venstein as Research Network Director was crucial to expanding the scope of the Foundation’s efforts in the research arena; and I am confident that he will assist in developing the direction in which the AMDA Foundation’s Research Network will proceed.

Finally, I am confident that—with the dedication of the AMDA membership, the AMDA Foundation Board, volunteers, staff, and other friends of the Foundation—we will continue to increase the Foundation’s scope and expand our research, our mentoring and Futures program, and fundraising efforts in the coming years.

Wishing you the best,

Jonathan Musher, MD, CMD
Chair, AMDA Foundation
The AMDA Foundation continues to evolve as an organization; and this year was a reflection of that evolution. The AMDA Foundation Board and staff continue the commitment to move the organization forward and set goals for ourselves that will help the Foundation’s growth in the coming years. The Foundation Board began a strategic planning process to review the organization’s fundraising strategies and structure, as well as the way we communicate with the public and AMDA members. The 2008-2011 Strategic Plan will position the Foundation to continue its mission in the coming years.

The year brought about many positive changes to the Foundation. Dr. Stefan Gravenstein was hired as the Research Network Director and began his tenure on April 1. Dr. Gravenstein brings with him vast experience in long term care research. He will be a tremendous asset to the Foundation and its Research Network as we look for opportunities to expand the organization and the number of studies we generate each year.

The new AMDA Foundation web site was rolled out in 2007. Designed to be more user friendly, it also provides more options in providing important and timely information to AMDA members, Research Network members, and the public. It also moves the Foundation forward in becoming a more “green” organization, as applications for programs and donations now can be submitted online.

The Foundation also implemented a new awards program in 2007—the AMDA Foundation/Evercare® Awards: “Improving the Quality of Life for Persons Living in Nursing Homes”. The awards program is supported by Evercare and seeks to recognize programs that nursing facilities have implemented and demonstrated to improve the quality of life for their long term residents. Three awards of $10,000 each will be presented to selected nursing homes annually. The winners will be announced at the 2008 AMDA Annual Symposium.
The 2007 Futures program was successful, once again attracting a full class of eager residents and fellows interested in becoming medical directors. This year marked the first year for Heidi White, MD, CMD, as co-chair. Co-chair Cari Levy, MD, CMD, has functioned in that position for a number of years. The two did an outstanding job organizing the program, and I would like to thank them both for their leadership of this popular and important program.

In 2007, we also conducted a survey of past Futures participants to determine if the Futures program had any impact on their career choice and to determine if they have indeed pursued careers as medical directors. Not only did the majority of respondents move forward in careers in long term care, the majority of them are AMDA members. The survey is a validation of the program’s importance and its impact on the decision to choose a career in long term care.

The year brought about the types of significant changes that can be expected as an organization changes and continues to grow. Three long-time Foundation employees, Janet Pailet, Barbara Calabrese and Erin Blume, moved on to other professional challenges. Each contributed immensely to the organization and will be missed by both Foundation staff and volunteers.

I would like to thank the AMDA Foundation Board of Directors for their continued support and dedication to the organization. I would also like to thank the AMDA Board of Directors and AMDA Executive Director Lorraine Tarnove for their support of the Foundation. Finally, I would like to thank Foundation staff--past and present--for all of their hard work throughout the year. The Foundation’s successes would not be possible without the hard work and support of staff and volunteers.

I look forward to the many opportunities on the horizon for the coming year, including the presentation of the new AMDA Foundation/Evercare® Awards, the implementation of our new strategic plan, and the launch of new research studies in long term care. Building on the strong foundation we have constructed, we will make 2008 another memorable year.

Respectfully submitted,

Gwendolyn D Maddox, MS
Executive Director
During 2007, the Long Term Care-Quality Improvement Partnership completed its project after four years of planning, challenges, data collection, and data analysis by Quality Partners of Rhode Island. As of March, all nursing homes completed their participation, which involved implementing its assigned clinical practice guideline and collected process of care data three times.

Preliminary analysis indicated that 20 nursing homes submitted data for the 10 pressure ulcer process measures and 17 submitted data for the eight pain process measures. Quality Partners of Rhode Island will calculate process measures and analyze the data. The project team currently is examining pre- and post-intervention process measures for all facilities, pre- and post-intervention quality measure scores for all facilities, and improvement for nursing homes assigned to each clinical topic, as compared to the control homes. The group is also conducting statistical analyses to evaluate the impact of interventions.

Currently, project lead investigator David Polakoff, MD, MSc, CMD and colleagues are working on a manuscript that will discuss the study’s results and a companion piece that will discuss the barriers encountered during the course of the research. The paper will be submitted to the Journal of the American Medical Directors Association (JAMDA).

The Foundation looks forward to the publication of the study’s findings and is grateful to the LTC-QI Partnership members and participating facilities for their support of this project.
The AMDA Foundation Long Term Care Quality Improvement Partnership is a set of multidisciplinary, national and state-based networks that evaluated the effectiveness of AMDA’s pain and pressure ulcer clinical practice guideline (CPG) implementation tool kits in long term care facilities.

The project was funded by a four-year Agency for Healthcare Research and Quality (AHRQ) grant. The project initially was rolled out in 50 facilities across six states: California, Indiana, Florida, Ohio, Pennsylvania, and Texas.

Lead partners in the project include AMDA, the AMDA Foundation and its Long Term Care Research Network, the American Health Quality Association (representing the state Quality Improvement Organizations) and Quality Partners of Rhode Island. These four organizations constitute the Leadership Team.

In addition to the Leadership Team, a National Long Term Care Quality Coalition consisting of representatives from more than 15 long term care professional and provider groups serves in an advisory capacity. Coalition supporters form the “Partnership” and aid the project by promoting it in their member publications, through presentations and training at their annual meetings, and by providing outreach at the local level in the six pilot states.

The primary goals of the project include validation of AMDA’s pain and pressure ulcer CPGs; dissemination of evidence-based CPG implementation and training models that can be used in nursing homes throughout the country; and improved outcomes for the 1.6 million residents of long term care facilities.

Long Term Care Quality Improvement Partnership Stakeholders

American Association of Homes and Services for the Aging
American Association of Retired Persons
American College of Health Care Administrators
American Health Quality Association (representing the QIOs)
American Health Care Association
American Hospice and Palliative Care Organization
American Hospice Foundation
AMDA
AMDA Foundation and the LTC Research Network
American Society of Consultant Pharmacists
Beverly Healthcare
Consumer Coalition for Quality Health Care
GlaxoSmithKline
Mariner Health Care
National Association of Directors of Nursing Administration in LTC
National Association of Geriatric Nursing Assistants
National Citizen’s Coalition for Nursing Home Reform
National Conference of Gerontological Nurse Practitioners
National Hospice and Palliative Care Organization
National Policy and Resource Center on Nutrition and Aging
Omicare, Inc.
Pharma-Care, Inc.
Quality Partners of Rhode Island
The Long Term Care Research Network underwent some important changes in 2007.

An important accomplishment for the Research Network in 2007 was the appointment of a new Research Network Director, Stefan Gravenstein, MD, MPH, CMD. An experienced researcher and long-time Research Network member, Dr. Gravenstein succeeded Jurgis Karuza, PhD, who served as Interim Director for over a year while the Foundation conducted an extensive search for a permanent appointee. Prior to that, Larry Lawhorne, MD, served as the Network’s first Director for nearly five years.

In addition to his role with the Network, Dr. Gravenstein is Clinical Director of the National Nursing Home Quality Improvement Organization Support Center at Quality Partners of Rhode Island, a national leader in health care quality improvement and the Medicare QIO for the state of Rhode Island.

The LTC Research Network Spring Conference was held in Hollywood, FL. Members had a unique opportunity to share in depth their thoughts, hopes, and vision for the future direction of the organization. Working in small groups, Network members came up with several issues they would like to see as part of the organization’s focus, including greater collaboration among researchers and with administrators and owners on research projects.

The Fall Research Network Conference took on a different look from past programs. Scheduled for November 17, 2007, in San Francisco, the conference was held in conjunction with the Gerontological Society of
America meeting and was limited to one evening as to not interfere with GSA workshops. The conference was entitled “Continuity of Care Across the Continuum” and featured Dan Osterweil, MD, MscED, CMD, as the keynote speaker. In addition, several current studies were presented for discussion including “Better Glycemic Control in the Long Term Care Facility”; “The VeriMed Patient Information System,” and ”The LTC-QI Study Report”. There was also an opportunity for attendees to discuss research studies that they currently had in progress. Finally, there was great discussion about upcoming events and programs and how the Foundation can best meet the needs of Research Network members.

Honoring Dr. Karuza

The AMDA Foundation honored Jurgis Karuza, Jr., PhD, who served as Interim Director of the Research Network for over a year, at AMDA’s 30th Annual Symposium, in Hollywood, FL. Dr. Karuza, who led the Network through two meetings and progress on several projects, said, “The Research Network is in its adolescence and going through a natural transition, including a change in leadership. I was honored to be asked to step in as Interim Director to keep things moving along during this period of transition, so that the AMDA Foundation Board would not be rushed and could exercise due diligence in selecting the new Director”. While this was a transition period, the Research Network was far from dormant.

During 2007 seven study applications were submitted to government agencies and other companies for funding. During the year, two were approved for funding: “Better Glycemic Control in the Long Term Care Facility”, where the objectives are to determine if utilization of a blood glucose monitoring system will produce better glycemic control among residents and to establish a quality improvement process for better glycemic control in the long term care facility that includes active participation of the facility medical director in removing residents from sliding scale protocols and “Assessment of the VeriMed Patient Information System” which will seek to assess whether implementation of the VeriMed patient information system can improve patient outcomes and medical information acquisition and documentation in transfers from long term care facilities.
In 2007, the Foundation recognized talented visionaries, passionate researchers, and innovative leaders. The individuals set an example and established a new standard of excellence for others.

AMDA Foundation/Pfizer Quality Improvement Awards Program

The AMDA Foundation/Pfizer Quality Improvement Awards Program which is in its seventh year, provides $10,000-$15,000 awards to support initiatives that focus on facility staff education, quality improvement programs, research on interventions and treatment, and health literacy to directly enhance the quality of care provided to patients in long term care settings. The awards are intended to cover salary support, consultant fees, materials, and travel to the AMDA Annual Symposium to present project results.

The 2007 AMDA Foundation/Pfizer Quality Improvement Committee and its chair, Leslie Libow, MD, CMD were pleased to present awards to three recipients. These recipients will present their findings from their studies at the "Quality Improvement Awards: One Year Update" session at the 2008 AMDA Symposium.

The 2007 award recipients are:

**General QI Award Winner:**
Alice F. Bonner, PhD, “Patient Safety Culture and Quality Outcomes in Nursing Homes: Examining the Relationship,” University of Massachusetts, Worcester, MA.

**Therapeutic QI Award Winners:**
Mary Ersek, PhD, RN, “Web-based Education to Enhance Pain Assessment in Nursing Homes,” Swedish Medical Center, Seattle, WA.

Sumi Misra, MD, MPH, “Can the Specificity of Physician Orders about PRN Pain Medications Increase Resident Control Over Pain?” Vanderbilt University, Nashville, TN.

“A**nd “None of us will ever accomplish anything ex*ellent or commanding exception when he listens to this whisper which is heard by him alone.” -RALPH WALDO EMERSON
The 2007 AMDA Foundation/Pfizer Quality Improvement Awards Selection Committee

**Leslie S. Libow, MD, CMD, Chair**
Distinguished Clinical Professor, Jewish Home and Hospital Life Care System
Clinical Professor, Mount Sinai School of Medicine
New York, NY

**Jacob Dimant, MD, CMD**
Medical Director, Lutheran Augustana Center for Extended Care and Rehabilitation
Chief of Geriatrics, Lutheran Medical Center
Brooklyn, NY

**David Nace, MD, MPH**
Assistant Professor of Medicine
Director, Long Term Care
University of Pittsburgh
Division of Geriatric Medicine
Pittsburgh, PA

**Dan Osterweil, MD, MscEd, CMD**
Principal
Senior Health Advisors
Concord, MA

**David Polakoff, MD, MSc, CMD**
Principal
Senior Health Advisors
Concord, MA

**David R. Zimmerman, PhD**
Professor of Industrial Engineering
Director, Center for Health Systems Research and Analysis
University of Wisconsin-Madison
Madison, WI

A Total of $261,270 has been awarded for research in the Quality Improvement Awards Program.

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30% Awarded Seed and General Research Grants $96,000
70% Awarded to Quality Improvement Research Projects $261,270
Total Amount of Grants Awarded $357,270
Each year, a record number of residents and fellows apply to participate in the AMDA Foundation Futures program, and 2007 was no different. The goal of the program is to increase the number of residents and fellows interested in long term care practice as medical directors, attending physicians, and long term care researchers. The 2007 program attracted 59 participants who came to the AMDA Annual Symposium to learn about long term care careers. Program Co-Chairs Cari Levy, MD, CMD, and Heidi White, MD, CMD successfully planned a program that provided participants with a current and enlightening picture of long term care. After the meeting, participants submitted glowing reviews of the program; and many indicated that it influenced their future career decisions.

In addition to sessions that offer a general overview of long term care practice, the program included expert speakers on successful job search techniques, quality improvement and clinical practice guidelines, surviving your first state survey, and options, negotiations, and contracts.

Janssen, LLC, sponsored the Futures program and Johnson & Johnson Health Care Systems supported the Wednesday night reception.

The AMDA Foundation conducted a survey in 2007 to determine the impact of the Futures program on its attendees and to assess where they are in their career choice and whether they still felt that the program was valuable.

**Survey results showed that:**

- 81% of respondents are current members of AMDA.
- 78% work in long term care and 80% work full time.
- More than half (53%) of respondents responded that the Futures program greatly affected their decision to enter long term care, 22% said that it had some effect.
- 100% of the respondents responded that the program is valuable to residents and fellows.
2007 Futures Class
Fundraising

“We make a living by what we get, but we make a life by what we give.”

-Winston Churchill

AMDA members and other friends of the AMDA Foundation demonstrated their support for the Foundation through generous donations to the organization in 2007.

The Foundation’s second annual art auction, “Art of Caring, Works of HeART,” raised $21,000 to benefit programs and research initiatives. The highest bid for one item—$3,200—went to a print entitled “Art for Art’s Sake” by Rhonda Ostrow, a senior artist in Maryland. Evercare, Merck, and Johnson & Johnson Health Care Companies sponsored the event, which attracted approximately 200 participants to bid on over 90 items. In addition to artwork by both seniors and professional artists such as Salvador Dali, the auction featured photographs by AMDA members Jeffrey Levine, MD, CMD, and Mario Cornacchione, DO, CMD—each of whom donated three of their pieces. The auction also included hotel packages, jewelry, AMDA Annual Symposium registration, AMDA Clinical Practice Guidelines, and bottles of wine and wine accessories.
The 2007 Wall of Caring attracted tributes from AMDA members and friends for a total of $44,000 in contributions. This includes a $20,000 matching donation from Ortho Biotech. Many of the tributes posted on the Wall, which is a traditional event at the Annual Symposium, recognized Andrew Weinberg, MD, CMD; David Wilcox, MD, CMD, CWS, FACP; and Robert Townsend, MD – AMDA veterans and long term care leaders who passed away in the last year. Additionally, 11 AMDA state chapters made generous pledges. Those chapters include: Florida, Idaho, Indiana, Maryland, Michigan, Nebraska, New York, Pennsylvania, Tennessee, Washington, and Wisconsin.
Any organizations faced financial challenges in 2007, and the AMDA Foundation was no different. However, our programs continued with a strong presence throughout the year and with a positive outlook for the future. Foundation staff and leadership were diligent in ensuring that funding was secured for all programs throughout the year. The organization continues to be fiscally responsible in all respects to ensure that the donations we receive throughout the year are handled responsibly to support the Foundation’s mission. We continue to aggressively pursue funding from a variety of sources to enable the Foundation to continue to achieve its mission.
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Pfizer, Inc.
Roche Diagnostics, Corp.
TN Association of Long Term Care Physicians
VeriChip
Washington State Medical Directors Association
Wisconsin Association of Medical Directors

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($1,000-$4999)

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Tim Fox, MS, PT
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Edward S. Warren, MD, CMD
Peter Winn, MD, CMD
John C. Wright, II, MD, CMD-R

Friend ($100-$249)

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