Advancing the quality of life for persons in post-acute & long-term care (PA/LTC) through inspiring, educating and recognizing future and current health care professionals.
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Kansas City, KS

Christopher Laxton, CAE
Columbia, MD

*Executive Committee
Message from the Executive Director

It has been a year of excitement, hard work, and some new changes for the Foundation. In the Fall of 2015, a series of strategic planning sessions were held, in concert with the Society and ABPLM strategic planning, resulting in a new set of goals, including changing our focus to become a key fundraising vehicle for the Society and its entities. A clear need for a true fundraising body became apparent after many discussions with the Society, ABPLM, Board members, and various other PA/LTC stakeholders.

Under Dr. Paul Katz’ able and engaged leadership, the Foundation will begin the work to shift our focus to raising funds to support the many projects of the Society and its affiliates.

In 2015, the Foundation continued to support its strategic plan in the following ways:

- **The Foundation Futures Program** is still an important component of our strategic plan in workforce development. We were very gratified that our state chapters increased their 2015 donation to the Futures Program by 74% over 2014. The program hosted 63 participants from 44 residency/fellowship programs from across the nation, and one participant from Canada, highlighting the great value the education community places on the Futures Program.

  Going forward, we wish to build on the Futures’ success and continue to expand the program to include inter-professional participation, as well as the support provided to participants for the early part of their career, including additional resources and discounted education.

  Additionally, in order to expose more individuals to the Futures Program, post-acute and long-term care (PA/LTC) workforce, and the Society’s new complimentary student membership, the Foundation exhibited at the American Medical Association House of Delegates Specialty Showcase in Chicago, greatly expanding our reach to students, fellows, and residents.

- **In terms of international outreach**, the Foundation was pleased to host a group from the Netherlands at the Louisville conference in 2015.

- **The Foundation’s awards programs** continue to recognize PA/LTC leadership and innovation through our Medical Director of the Year Award, William Dodd Founder’s Award for Distinguished Service, and James Pattee Award for Excellence in Education.

- **With respect to research**, the Foundation helped to advance quality and improve care in the application of PA/LTC research through our Quality Improvement Awards program. We were also happy to provide support for Steven Handler’s, MD, PhD, CMD, from the University of Pittsburgh, survey project on telemedicine in PA/LTC.

- **Our public outreach continued** in 2015, as the Foundation collaborated with the City of Louisville, Louisville Convention & Visitors Bureau, and the University of Louisville for the AMDA Foundation Town Hall: Learning About Quality Long-Term Care for You & Your Loved Ones, which was open to the general public.

It has been very gratifying to work with Dr. Katz and the entire Foundation Board as we sharpen the focus of the Foundation’s work and extend its reach and visibility. I want to thank Dr. Katz and all members of the Foundation Board of Directors for their dedication and engagement as we begin undertaking this significant restructuring of the Foundation. We also owe a special thanks once again to Drs. Cari Levy and Heidi White for their tireless leadership of the Foundation Futures Program. And none of the Foundation’s programs would take place without the creative and dedicated efforts of Foundation Manager Christine Ewing. Chris, thanks for all you do.

As always, I’d love to hear from you – our members, donors and stakeholders. We benefit greatly from the wisdom and energy of our community. Please reach out to me at 410-992-3104 or claxton@paltc.org.

Thanks for your support!

Christopher E. Laxton, CAE
Executive Director
By the year 2030, nearly 20% of the U.S. population will be over the age of 65. It will take 30,000 practitioners to care for them. Currently, we have less than 10,000. In 2015, these numbers became a central part of the Foundation’s inspiration to continue to pursue its mission to advance the quality of life for persons in post-acute and long-term care (PA/LTC) through inspiring, educating, and recognizing future and current health care professionals.

The year 2015 included an expansion of the Futures Program both in numbers and disciplines, an annual conference-based fundraising program, awards that recognized outstanding leaders and inspired others to improve the quality of care they provide, a Town Hall meeting for individuals interested in learning about taking care of loved ones in long-term care, and a Caring Canines calendar that promoted the value of animal-assisted and person-centered therapy in PA/LTC. The 2015 Strategic Plan included five goals:

1. Educate, mentor, inspire, and recognize futures and current PA/LTC professionals.
2. Advance quality and improve care through the application of PA/LTC research.
3. Enhance the global awareness and best practices in PA/LTC.
4. Establish financial stewardship
5. Public education
Futures Program

The Futures Program, which brings fellows, residents and advanced practitioners to AMDA – The Society for Post-Acute and Long-Term Care Medicine’s Annual Conference for a special one-day program about working in PA/LTC, is a popular initiative that fills up quickly every year. In addition to participation in the one-day program, participants receive a full registration for the Society’s Annual Conference and a one-year Society membership; those receiving a full scholarship also get transportation to and from the conference, plus four nights of lodging covered.

Futures supporter Rajeev Kumar, MD, CMD, said, “As the name indicates, the program is all about the future of our profession. We need to get these young practitioners’ attention now. Once they are out of school and practicing, it is more difficult…By getting their attention now, we can make them true believers.”

In 2015:
- Sixty-three participants, including nurse practitioners and physician assistants from 44 programs from across the country attended the program.
- Sixteen of the Society’s State Chapters financially supported the program.
- Two private physician practices - Physicians Eldercare in Winston Salem, NC and Central Ohio Geriatrics, LLC in Granville, OH – each supported the attendance of a Futures participant.
- Kindred Healthcare was a major supporter, as they have for the past six years.
- The program continues to enjoy the support of the Society’s members. Please see the list of our generous donors that help make this program possible.
- Program Co-Chairs Cari Levy, MD, PhD, CMD, and Heidi White, MD, MEd, CMD, oversaw the program for the ninth year.
- Futures participants and Certified Medical Directors interacted during a pre-conference reception, held to encourage mentorships and networking, and to establish connections and relationships.
- The program continued to receive excellent feedback from the participants.
I was impressed with the incredible amount of thought that goes into the Futures Program. They bring together a top-notch group of experts to provide an incredible snapshot of PA/LTC.

~ Rebecca King-Tucker, MD, CMD
Leadership Awards

Recognizing leaders not only pays tribute to those who are exceptional and visionary; it also inspires others to take up the baton in their own communities. In 2015, we honored three practitioners who touch lives and create a ripple effect with their passion, generous spirits, and professional expertise:

2015 Medical Director of the Year

Patricia Chace, MD, CMD, medical director at Optum Healthcare in Rhode Island, was named the 2015 Medical Director of the Year. Known as a passionate innovator and effective team leader, she has implemented and promoted many important initiatives to maximize quality of care and quality of life for residents.

“Dr. Chace has been an exemplary role model for us all. She always finds the time to help, she never considers a question too trivial or mundane to address, and she leaves a little something of an educational nature with each person. She considers every team member to be a valued colleague. She’s always thinking outside the box and is incredibly knowledgeable, creative, and attentive.”

~Judith Bessoff, NP, BS, MDH, Nurse practitioner and long-time colleague of Dr. Chace’s
J. Kenneth Brubaker, MD, CMD, medical director of Masonic Village in Elizabethtown, PA, and 2009 AMDA Medical Director of the Year, received the William Dodd Founder’s Award for Distinguished Service. The Dodd Award recognizes contributions to building the Society’s organizational strength, image, and mission, enhance the Society’s reputation, and advance goals enabling the Society to improve patient care.

Dr. Brubaker came to nursing home medicine as a family physician, and it was pretty much love at first visit. He enjoys the relationships with patients and families and working with other practitioners and staff who share his passion for quality care and ensuring the best possible quality of life for our frail elders. Clearly, Dr. Brubaker shares Dr. Dodd’s passion, vision, and commitment to quality patient care. He shares our founder’s warmth, humor, and energy.

~ Foundation chair Paul Katz, MD, CMD, in presenting the award.

Society Past-President Jonathan Evans, MD, MPH, CMD, a long-time medical director and educator in Charlottesville, VA, received the James Pattee Award for Excellence in Education during the Society’s annual conference. The award, named after the practitioner considered to be the ‘father’ of the Core Curriculum, recognizes significant contributions to the Society’s educational goals to advance education specific to post-acute and long-term care physician practice and to promote Society leadership via educational endeavors within the care continuum.

Dr. Evans’ service has spanned the time since the Society was a modest, hopeful organization to it being a robust, vital one providing national service of high impact. Dr. Evans was one of the many leaders that made AMDA’s transformation happen...He has devoted his entire professional career to this pursuit, with an uncompromising dedication to improving both the health care system and the professionalism of our specialty as providers in this often overlooked and dismissed setting.”

~ Foundation chair Paul Katz, MD, CMD, in presenting the award.
Quality Improvement Awards

As our health care system moves from volume to value, quality improvement has become a mandate for providers and practitioners alike. The Foundation was ahead of the curve on QI, instituting a quality awards program more than a decade ago.

The Quality Improvement & Health Outcomes Award (QIHO) provides awards of $1,000 each to facilities that have implemented programs that improved the quality of life for their residents. These prestigious awards are based on programs medical directors and care teams have successfully implemented and demonstrated to improve the quality of life for their post-acute and long-term care residents.

The Quality Improvement Award is designed to encourage the development of innovative projects that will help to make a distinct impact on the quality of post-acute and long-term care. The award supports 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 PA/LTC settings. The Committee elected to award $3,000 each to support the development of two projects.

The 2015 Quality Improvement & Health Outcomes Award:

Zachary Palace, MD, CMD, Hebrew Home at Riverside, Bronx, NY, for “Development of an Outpatient Transfusion Program to Reduce Avoidable Hospitalizations”. An important aspect of quality improvement involves rethinking current practices and seeking ways to bring about changes. This program developed a favorable alternative to the hospitalization of post-acute and long-term care patients requiring blood transfusion.
The 2015 Quality Improvement Award:

Phyllis Gaspar, PhD, RN, The Goodman Group, Chaska, MN, for “Implementation of the Prevention of Avoidable Hospitalizations for Assisted Living Facilities (ALF): A Pilot Study”. The project implemented the Prevention of Avoidable Hospitalizations for ALF residents’ protocols for residents with an at-risk probability of repeated admission score. The team integrated the use of the protocol, which incorporated an adaption of the INTERACT care transitions tool, with evidence-based programs that focus on wellness and self-management involving the resident and family.

Arif Nazir, MD, CMD, Indiana University School of Medicine; Gina Couch, Westpark Rehab and Nursing for “POISe-Care (Patient-Oriented Interdisciplinary Sub-acute Care): A Unique Model for Rehabilitation Patients.” This care model utilized biweekly bedside team rounds and encouraging patients to be “CEO” of their health. It provided continuous performance feedback to the team and was aimed to resulting in greater patients/caregiver engagement in care and higher satisfaction for patients, caregivers, and staff alike.
Encouraging research through partnerships with academic institutions and other stakeholders remains a cornerstone of the Foundation. In 2015:

- **Sliding Scale Insulin vs Basal-Bolus Insulin Therapy in Long-Term Care:** A 21-Day Randomized Controlled Trial Comparing Efficacy, Safety and Feasibility, an article on the results of a significant diabetes research study, was published in JAMDA. In 2011 the Foundation received a grant to fund the study. T.S. Dharmarajan, MD, the Principal Investigator on the study, said, “I love doing projects and initiatives for national organizations such as the Society and the Foundation. I believed in the study’s importance—my mother is in a nursing home and on sliding scale insulin—and the potential for this research to promote change and enable more practitioners to break the SSI habit.” The main objective of the study was to demonstrate the superior efficacy of basal/bolus insulin over sliding scale insulin in reducing mean fasting blood glucose concentration averaged over days 21-28 in nursing home patients with type 2 diabetes by use of an algorithm conversation tool.

- Nearly 500 Society Annual Conference attendees participated in a survey distributed at the Foundation booth. The survey about use of and attitudes about telemedicine was for a study by Futures graduate and Society member Steven Handler, MD, PhD, CMD. He used the results of the survey for an article he published in JAMDA. “The Society is the perfect venue to get information out on a grassroots level. Caring for an often forgotten population is a kind of calling; and the Society presents opportunities for collaboration to ensure we are doing the best we can for our patients.”
Fundraising

As always, the Foundation reached out to its members, friends, supports, and other stakeholder for support through fundraising initiatives both innovative and traditional:

- **The Wall of Caring**, where Society members and others pay tribute to their mentors, colleagues, patients, and others, raised nearly $20,000 in Louisville to support the Futures Program.

- **Caring at the Wall Auction**. Society members Daniel Swagerty, MD, CMD; Jeffrey Levine, MD, CMD; Barbara Resnick, PhD, CRNP; James Lett, MD, CMD, and others were among the contributors to the 2015 Auction. Annual Conference speakers Jason Karlawish, MD, and Louise Aronson, MD, also contributed signed books. The auction brought in nearly $8,000 to support Foundation programs.

- **The Caring Canines Calendar** brought a spotlight to the role of pets in patient-centered care and nearly sold out. “There are three things that our residents have a universally and significant response to—music, children, and animals,” said J. Kenneth Brubaker, MD, CMD, a Society member who was featured in the calendar with one of his residents at Masonic Village in Elizabethtown, PA.

Looking Ahead

While maintaining its current programs, in 2016 the Foundation will position itself as the fundraising entity for the Society and affiliate programs. “We have been working hard in recent months to envision how the Foundation can serve the broader needs of the Society and be more robust in its programming and fundraising capacity,” said Foundation Chair Paul Katz, MD, CMD.
Contributors

We gratefully acknowledge those who made the Foundation’s work possible in 2015.

Corporate Government and State Chapters
AMDA-The Society for Post-Acute and Long-Term Care Medicine
Avanir Pharmaceuticals
Central Ohio Geriatrics, LLC
Florida Medical Directors Association
GAPNA Foundation
Idaho Medical Directors Association
Illinois Medical Directors Association
Kindred Healthcare, Inc.
Louisiana Medical Directors Association
Michigan Medical Directors Association
Mid-Atlantic Medical Directors Association

Physicians ElderCare
Purdue Pharma L.P.
Sanofi
Sanofi Aventis U.S.
St. Louis University School of Medicine
South Dakota Medical Directors Assn
The Foundation for Geriatric Education
The Retirement Research Foundation
Tennessee Association of LTC Physician
Texas Medical Directors Association
Virginia Medical Directors Association
University of Pittsburgh
Wisconsin Association of Medical Directors

Founders Club
($10,000 over a lifetime)

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Lori Bright-Long, MD, CMD
J. Kenneth Brubaker, MD, CMD
Charles A. Crecelius, MD, PHD, CMD
Keith Krein, MD, CMD
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& Cheryl L. Phillips, MD, CMD, AGSF
Susan M. Levy, MD, CMD
Keith Rapp, MD, CMD
William Smucker, MD, CMD
& Helen Smucker, RN
Daniel Swagerty, Jr., MD, MPH, CMD
Peter Winn, MD, CMD

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R B Whitney
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Benjamin Yeboah, MD, FACP
Sheryl Zimmerman, PhD
INDEPENDENT AUDITORS' REPORT

To Board of Directors
AMDA Foundation
Columbia, MD 21044

We have audited the accompanying financial statements of the AMDA Foundation, Inc. (the “Foundation”), which comprise the statements of financial position as of December 31, 2015 and 2014, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

Management’s Responsibility for the Financial Statements
Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor’s Responsibility
Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor’s judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity’s preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity’s internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion
In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the AMDA Foundation, Inc. as of December 31, 2015 and 2014, and its changes in net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Columbia, Maryland
March 30, 2016
## STATEMENTS OF ACTIVITIES
YEARS ENDED DECEMBER 31, 2015 AND 2014

### REVENUE AND SUPPORT

<table>
<thead>
<tr>
<th>Source</th>
<th>2015 (Unrestricted)</th>
<th>2015 (Temporarily Restricted)</th>
<th>2015 (Total)</th>
<th>2014 (Unrestricted)</th>
<th>2014 (Temporarily Restricted)</th>
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<td>$134,353</td>
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<td>Contract Revenue</td>
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<td>AMDA Member and Other Contributions</td>
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<td>Interest Income</td>
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<td>Other Income</td>
<td>9,957</td>
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<td>Net Assets Released from Restrictions</td>
<td>103,183</td>
<td>(103,183)</td>
<td>81,500</td>
<td>(81,500)</td>
<td>–</td>
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<tr>
<td><strong>Total Revenue and Support</strong></td>
<td>400,364</td>
<td>(72,683)</td>
<td>327,681</td>
<td>261,917</td>
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### EXPENSES

#### Program Services

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<tr>
<th>Program</th>
<th>2015 (Unrestricted)</th>
<th>2015 (Temporarily Restricted)</th>
<th>2015 (Total)</th>
<th>2014 (Unrestricted)</th>
<th>2014 (Temporarily Restricted)</th>
<th>2014 (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Symposium</td>
<td>6,197</td>
<td>–</td>
<td>6,197</td>
<td>4,455</td>
<td>–</td>
<td>4,455</td>
</tr>
<tr>
<td>Futures Program</td>
<td>75,535</td>
<td>–</td>
<td>75,535</td>
<td>78,217</td>
<td>–</td>
<td>78,217</td>
</tr>
<tr>
<td>Research Funding</td>
<td>115,216</td>
<td>–</td>
<td>115,216</td>
<td>51,938</td>
<td>–</td>
<td>51,938</td>
</tr>
<tr>
<td>Awards Programs</td>
<td>23,464</td>
<td>–</td>
<td>23,464</td>
<td>31,527</td>
<td>–</td>
<td>31,527</td>
</tr>
<tr>
<td><strong>Total Program Services</strong></td>
<td>220,412</td>
<td>–</td>
<td>220,412</td>
<td>166,137</td>
<td>–</td>
<td>166,137</td>
</tr>
</tbody>
</table>

#### Support Services

<table>
<thead>
<tr>
<th>Service</th>
<th>2015 (Unrestricted)</th>
<th>2015 (Temporarily Restricted)</th>
<th>2015 (Total)</th>
<th>2014 (Unrestricted)</th>
<th>2014 (Temporarily Restricted)</th>
<th>2014 (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fundraising</td>
<td>52,003</td>
<td>–</td>
<td>52,003</td>
<td>44,045</td>
<td>–</td>
<td>44,045</td>
</tr>
<tr>
<td>Management and General</td>
<td>60,278</td>
<td>–</td>
<td>60,278</td>
<td>57,967</td>
<td>–</td>
<td>57,967</td>
</tr>
<tr>
<td><strong>Total Support Services</strong></td>
<td>112,281</td>
<td>–</td>
<td>112,281</td>
<td>102,012</td>
<td>–</td>
<td>102,012</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>332,693</td>
<td>–</td>
<td>332,693</td>
<td>268,149</td>
<td>–</td>
<td>268,149</td>
</tr>
</tbody>
</table>

### CHANGE IN NET ASSETS

<table>
<thead>
<tr>
<th>Source</th>
<th>2015 (Unrestricted)</th>
<th>2015 (Temporarily Restricted)</th>
<th>2015 (Total)</th>
<th>2014 (Unrestricted)</th>
<th>2014 (Temporarily Restricted)</th>
<th>2014 (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change in Net Assets</td>
<td>67,671</td>
<td>(72,683)</td>
<td>(5,012)</td>
<td>(6,232)</td>
<td>(23,500)</td>
<td>(29,732)</td>
</tr>
</tbody>
</table>

### NET ASSETS, beginning of year

<table>
<thead>
<tr>
<th>Source</th>
<th>2015 (Unrestricted)</th>
<th>2015 (Temporarily Restricted)</th>
<th>2015 (Total)</th>
<th>2014 (Unrestricted)</th>
<th>2014 (Temporarily Restricted)</th>
<th>2014 (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015 ANNUAL REPORT</td>
<td>$200,030</td>
<td>103,183</td>
<td>303,213</td>
<td>206,262</td>
<td>126,683</td>
<td>332,945</td>
</tr>
</tbody>
</table>

### NET ASSETS, end of year

<table>
<thead>
<tr>
<th>Source</th>
<th>2015 (Unrestricted)</th>
<th>2015 (Temporarily Restricted)</th>
<th>2015 (Total)</th>
<th>2014 (Unrestricted)</th>
<th>2014 (Temporarily Restricted)</th>
<th>2014 (Total)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Net Assets, end of year</strong></td>
<td>$267,701</td>
<td>$30,500</td>
<td>$298,201</td>
<td>$200,030</td>
<td>$103,183</td>
<td>$303,213</td>
</tr>
</tbody>
</table>