



**INVEST.
EDUCATE.
ADVANCE.**

Serve.



THE FOUNDATION
FOR POST-ACUTE AND
LONG-TERM
CARE MEDICINE

**THE 2023
IMPACT REPORT**



Dear Colleagues & Friends,

On behalf of The Foundation for Post-Acute and Long-Term Care Medicine, our board of directors, committee volunteers, and many donors, we are pleased to provide you with this 2023 Impact Report of our work this past year. This year, I have seen the generosity of the members of AMDA – The Society for Post-Acute and Long-Term Care (PALTC) Medicine and so many other donors committed to PALTC, and find myself in awe of what has been accomplished through your efforts. As a reminder, the PALTC Foundation is the only philanthropic entity dedicated exclusively to supporting and enabling professionals and clinicians working in the post-acute and long-term care medical service area. Our mission is to support workforce development initiatives while providing education, clinical resources, and funding for national research supporting excellence in practice and care.

You will see through this report that we have made great advancements this last year in serving our mission by supporting the largest class of Futures participants in the program's 20-year history while awarding two national research grants; the first, "Certified Medical Directors in Nursing Homes: An Evaluation of the Current Landscape, their Association with Quality, and Early Impacts of California Law AB749" by Drs. Brian McGarry and David Grabowski; and the second, "Post-Acute Care Utilization Patterns and Outcomes for Frail Older Adults" led by Dr. Charles Semelka.

We also supported AMDA programs by funding Phase 3 of the "Drive 2 Deprescribe" program and supporting a Community Platform for members to connect and share best practices. While supporting these worthy endeavors, we have further developed our capability to establish donor-endowed funds that allow donors to gift in a manner that will preserve their gift in perpetuity while supporting the Foundation annually from their generous philanthropic investment.

Wishing you joy and good health and our gratitude for your generous spirit of interest and support of our work to serve the PALTC future. We look forward to doing even more together in 2024.

Yours in service to our profession and those we serve,

Sincerely,

Heidi White, MD, MHS, MEd, CMD
CHAIR, FOUNDATION FOR PALTC MEDICINE



We hope you will be inspired as we continue to grow and strengthen our stance in raising funds to increase our support on a national platform for the ultimate benefit of you and the patients you serve. There is much more we can accomplish together and your continued trust in our endeavors and ongoing philanthropic support will ensure we reach our shared vision.



HOW CAN YOU HELP SUPPORT THE FOUNDATION?

Contributions make an immediate impact on the work of the PALTC Practitioner through the advancement of educational pursuits, national connections to clinicians working in the post-acute and long-term care field, the advancement of research and program initiatives that start the transformational process of excellence.

The PALTC Foundation is grateful for the many gifts provided to sustain and advance future work. Support may be offered through philanthropic gifts in the form of cash, stock, or IRA distribution donations, or may be gifted through planned giving vehicles to benefit your financial planning in support of the Foundation's mission.

How Funds Are Used

The PALTC Foundation and all gifts received make a lasting impact through the below-specified funding areas.

The PALTC Foundation Annual Fund provides unrestricted support allowing the Foundation to respond to the most immediate funding needs and promising opportunities. These contributions help in the following areas and may also be donor-designated to directly benefit these needs.

>> Education & Training

Advance education and training for PALTC practitioners bridging gaps in educational needs for PALTC clinicians thereby improving the competence of clinicians working in PALTC.

>> Clinical Resources

Support the development and implementation of specific PALTC evidence-based guidance to improve the standard of care.

>> Workforce Development

Support the advancement and adequate supply of competent PALTC practitioners and workforce with worthy annual programs such as the Futures Program.

>> Research

Support and promote the development of new evidence for optimal care in PALTC.

The PALTC Foundation Legacy Fund – protects the future of PALTC by pooling and investing donations in perpetuity allowing the Board to direct earnings to fund transformational projects and programs.

Donor Named Endowed Funds – provides a legacy for donors interested in supporting the Foundation with a major gift which may be named and donor-designated to support a specific program or funding area. It is invested with annual distributions taken from the earnings for the benefit of the Foundation's mission to ensure the future health and well-being of our PALTC profession and organizations. If you would like further information on how to establish a named endowed fund, please contact Victoria Hann, Foundation Director at vhann@paltc.org.

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THE FOUNDATION FOR POST-ACUTE AND LONG-TERM CARE MEDICINE

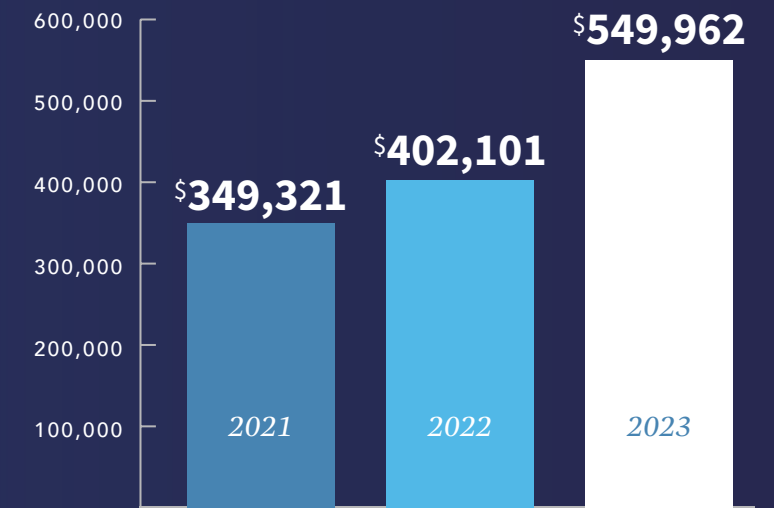
The Reasons We Give

2023 Impact Report

The PALTC Foundation is the only philanthropic entity dedicated exclusively to supporting and enabling professionals and clinicians working in this critical service area. In 2023, the PALTC Foundation raised \$549,962 through the foresight and generosity of individuals and corporations, state chapters, and association program support.

Below are some of the projects and efforts funded by donations and your Foundation's Impact on PALTC in 2023.

DOLLARS RAISED
BY DONORS +
FRIENDS TO FUND
THESE INITIATIVES ▶



2023 RESEARCH & CLINICAL RESOURCES GRANTS

The Foundation for Post-Acute and Long-Term Care Medicine focuses its fundraising and grantmaking activities on advancing vital strategic priorities in supporting excellence and innovation in service to the practitioners working in the post-acute and long-term care medical field.

In 2023, the Foundation supported the below with funding support totaling \$90,500. In 2024, the Foundation has committed \$100,000 in support of funding awards focused on research and clinical projects in the advancement of excellence to accepted grants.

More information and submission procedures can be found at paltcfoundation.org.

\$90,500 AWARDED TOTAL



“Post-Acute Care Utilization Patterns and Outcomes for Frail Older Adults” lead investigator, Dr. Charles Semelka

\$25,000 AWARDED

Dr. Charles Semelka of Wake Forest University School of Medicine and his team of researchers will investigate the impact of frailty on post-acute care outcomes for older adults following hospital discharge. The study will assess whether there is an optimal setting for post-acute care services for frail older adults and how the degree of frailty affects anticipated outcomes. By analyzing data from one US-based healthcare system, the project seeks to understand the differences in hospital discharge location and health-related outcomes among older adults with and without frailty, while controlling for demographic and other common geriatric conditions. The study will also include a survey of SNF healthcare providers to gain insights into their experiences and suggestions for improving the care for patients with frailty.



“Certified Medical Directors in Nursing Homes: An Evaluation of the Current Landscape, their Association with Quality, and Early Impacts of California Law AB749” by Drs. Brian McGarry and David Grabowski

\$50,000 AWARDED

Dr. Brian McGarry of the University of Rochester and Dr. David Grabowski of Harvard Medical School were awarded Foundation funding to examine the effects of this new law and to more broadly study the impact of certified medical directors on the quality of care provided to patients and residents. Thus far, the project has leveraged several datasets, including CMS nursing home staffing data and American Board of Post-Acute and Long-Term Care Medicine (ABPLM) data on certified medical directors (CMD), to create a multi-year dataset that characterizes medical director involvement for nearly all of the roughly 15,000 nursing homes in the U.S. Ongoing analyses are examining the relationship between medical director presence, including the presence of a CMD, and the quality of care provided to residents. Results of these analyses are expected in the summer of 2024 and they will provide an important baseline for later evaluations of AB 749 when this law becomes binding for most California medical directors.

“Drive 2 Deprescribe” Phase 3

\$7,000 AWARDED

The PALTC setting has one of the highest polypharmacy rates, which increases the risk of adverse events and drug interactions. The optimization of medications benefits patients and their families by reducing their risk for adverse events and drug interactions, thus improving their quality of life and reducing financial costs. The care force working in PALTC benefits by reducing the overall medication burden, reducing the risk of patient falls and cognitive impairment, and improving global health outcomes such as hospitalization and death.

On May 20, 2021, AMDA, with support from the Foundation, launched the initiative: Drive to Deprescribe – Optimizing Medication Use in PALTC (D2D). Participation is free, with over 1,500 registrants.

There are 3 phases to this initiative: Phase 1 (2021-2022): Monthly calls, each focused on optimizing medication use of a different class of medication. Phase 2 (2023): Quarterly calls, quarterly podcasts, and the development of an Optimizing Medication Use in PALTC course (first 3 modules). Phase 3 (2024) Quarterly calls, and development of additional modules (3-4) for the Optimizing Medication Use in PALTC Settings course.

In 2024, with financial funding from the Foundation, the D2D team plans to produce: 3-4 new modules for our Optimizing Medication Use in PALTC course (each focused on optimizing medication use of a different medication class) and quarterly D2D podcasts.



Community Platform for AMDA Membership

\$8,500 AWARDED



AMDA members have long expressed the need for a vehicle to network outside of conferences with colleagues in sharing best practices, and opportunities for collaboration while building deeper relationships as a benefit to their AMDA membership. AMDA is launching a new website and with funding from the Foundation will host a Community Platform replacing the Members Only Forum that will allow members to connect via a directory, join special interest groups, search for forum posts, connect with committee members, and an array of other opportunities to connect and collaborate.

Workforce Development: The Futures Program

In 2023, 87 candidates attended AMDA's Futures Program, the largest class in this effort's history. In 2024, the Foundation has committed to funding \$100,000 to this program furthering the Foundation's continued commitment to inspiring practitioners to join the field of post-acute and long-term care medicine.

The PALTC Foundation has provided more than \$1.4 million dollars to the Futures Program over the last two decades sponsoring more than 1,400 healthcare professionals to explore and encourage leadership positions within the post-acute and long-term care space.



Excellence Awards Program

As part of our mission, the Foundation recognizes the outstanding contributions of our members to post-acute and long-term care medicine with the following annual excellence awards: These awards provide a very visual and lasting legacy to the professional pursuits and accomplishments of our giants in the field and set the example of exemplary practice for others to aspire to.

Nominations for 2025 are being accepted and may be submitted by 9/15/24 online at paltcfoundation.org.



**William Dodd
Founder's Award for
Distinguished Service**
Arif Nazir, MD, CMD

The William Dodd Founder's Award for Distinguished Service recognizes significant contributions to building the Society's organizational strength, image, and mission by promoting the development of competent, compassionate, and committed medical practitioners.

It is named for AMDA Founder William Dodd, MD, CMD.

The 2023 William Dodd Founders Award for Distinguished Service was awarded to Arif Nazir, MD, CMD. As shared in his nomination, "Arif has held every significant position in AMDA over the years. His presidency energized...the average, frontline AMDA member in a positive way. His push for increased technology utilization in PALTC was the first movement for the increased utilization of information technology for frontline clinicians. He has put AMDA and its clinicians in a positive spotlight. He has pushed care initiatives to his and other chains of facilities in quality initiatives and the use of intradisciplinary team members. To know him is to sense his impetus for positive change in PALTC."



**Medical Director
of the Year Award**
Rani Rao, MD, FMCP, CMD

The Medical Director of the Year Excellence Award recognizes those individuals whose vision, passion, leadership, knowledge, and commitment succeed in taking patient care to exceptional levels of quality, excellence, and innovation.

The 2023 Medical Director of the Year was awarded to Dr. Rani Rao, MD, FMCP, CMD. Dr. Rao's nominator said: "When Dr. Rao arrived at Coler on March 30, 2020, NYC was the epicenter of the COVID-19 Pandemic in our country, and all of her efforts became focused on dealing with this public health crisis of an unprecedented nature. From day one, she rounded with our frontline workforce on the nursing units, conducting group meetings to help calm their fears and apprehension while doing all that she could do to get them sufficient supplies and PPE, and to obtain emergency replacement staff for our health care workers who became ill from COVID-19. Throughout the pandemic months, she worked diligently with other key leaders at Coler to maintain close lines of communication between residents and their families, arranging interdisciplinary meetings via videoconference to discuss plans of care."



**James Pattee Award for
Excellence in Education**
<< Sheryl Zimmerman, PhD
Philip Sloane, MD, MPH >>

The James Pattee Award for Excellence in Education recognizes significant contributions to enhance AMDA's educational structure and framework to advance education specific to PALTC practice and promote AMDA leadership through educational endeavors within the LTC continuum. It was established to honor James Pattee, MD, CMD, the father of the AMDA Certification Program and the Core Curriculum program.

The 2023 James Pattee Award for Excellence was jointly awarded to Sheryl Zimmerman, PhD and Philip Sloane, MD, MPH. Their nominator explained, "Drs. Sloane and Zimmerman have performed the editor's role for JAMDA in an exemplary fashion. Always a voice for PALTC and AMDA, JAMDA has fulfilled that role incredibly well with their leadership. The journal has been elevated to a higher position in the academic world and made JAMDA the preeminent publication for PALTC. Worldwide articles have been solicited, edited, then accepted and published. Editorial articles have defined PALTC, outlining where it has been and where it should be headed. Many of those editorial articles have been penned by Drs. Sloane and Zimmerman, with the balance crafted by PALTC thought leaders. Drs. Sloane and Zimmerman are the exemplars of Jim Pattee's vision for PALTC education and dissemination through AMDA."



**2023 Clinician
of the Year Award**
Vikas Reddy, MD

The Clinician of the Year Award recognizes members of the interdisciplinary (IDT) team who serve in PALTC settings. It honors a licensed healthcare practitioner who is directly involved in treating and caring for people in PALTC settings and embodies excellence in patient/resident care.

The 2023 Clinician of the Year was awarded to Dr. Vikas Reddy, MD. Dr. Reddy's nominator noted that "Dr. Reddy is recognized as a strong advocate for our patients and residents and demonstrates compassion and thoughtfulness in his interactions with them and their families. His collaborative approach with other team members has established him as a role model amongst his peers and associates. Involvement in community medical services is important to him and he is constantly developing new projects to bring clinical insight and guidance to the vulnerable populations we serve."

MAJOR GIFTS MAKING A

Multi-Generational Impact

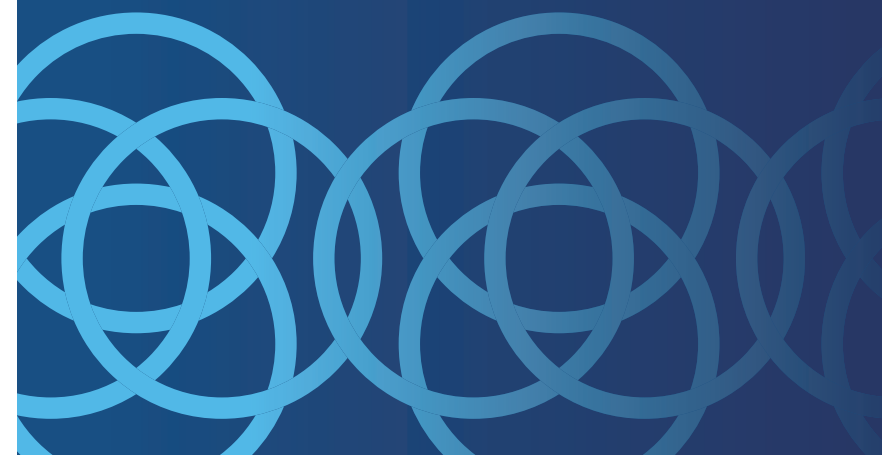


The Foundation for PALTC Medicine has established named endowed investment funds as a vehicle for gifting larger donations that are then invested and held in perpetuity in the donor's name benefiting the Foundation for generations to come.

The principal gift is protected while a percentage of the annual interest earned is used in support of general funding areas or may be designated by the donor to benefit a specific area of interest.

This past year, we gratefully accepted and established these donor-restricted endowed funds for the benefit of our Foundation's mission.

- 1 **Dr. Kenneth Brubaker Research and Education Fund**
- 2 **Dr. Susan Levy Futures Scholarship Fund**
- 3 **Dr. Steven Levenson Medical Direction Memorial Lectureship Fund**
- 4 **Christopher Laxton Excellence in Chapter Leadership Fund**
- 5 **Drs. Jonathan and Ursula Musher Futures Scholarship Fund**
- 6 **Dr. Robert Kaplan Futures Scholarship Memorial Fund**
- 7 **Dr. Rajeev Kumar Leadership Fund**





THE FOUNDATION FOR POST-ACUTE AND LONG-TERM CARE MEDICINE

Recognition & Giving Societies

Philanthropy has been the cornerstone for the Foundation since its inception...started by and for the PALTC practitioner.

To honor donors who include the Foundation in their philanthropic plans each year, the PALTC Foundation has created the below annual and lifetime giving societies to gratefully recognize and acknowledge these individuals for their trust through philanthropy.

LIFETIME GIVING SOCIETIES

The President's Club

Lifetime Donors of \$25,000 and above

**gratefully recognizes new President's Club Members ~ Welcome!*

David Brechtelsbauer MD, CMD
 Kenneth Brubaker MD, CMD
 Theodora Krantz
 Rajeev Kumar MD, FACP, CMD
 James Lett MD, CMDR & Cheryl Phillips, MD, CMDR
 Cari Levy MD, PhD, CMD
 Susan Levy MD, CMD
 Jonathan Musher MD, CMD and Ursula Musher MD
 Keith Rapp MD, CMD
 Robert Reynolds MD
 Heidi White MD, MEd, MPH, CMD
 Carolinas Society for Post-Acute and Long-Term Care Medicine
 Florida Society for Post-Acute and Long-Term Care Medicine
 Michigan Medical Directors Association
 Mid-Atlantic Society for PALTC Medicine
 New Jersey Medical Directors Association
 New York Medical Directors Association
 North Central Society for Post-Acute and LTC Medicine
 Ohio Society for Post-Acute and Long-Term Care Medicine
 Pennsylvania Society for Post-Acute and Long-Term Care Medicine
 Texas Society for Post-Acute and Long-Term Care Medicine
 Virginia Medical Directors Association

The Founders Club

Lifetime Donors of \$10,000 ~ \$24,999

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 Lory Bright-Long MD, CMD
 Charles Crecelius MD, PhD, FACP, CMD
 GAPNA Foundation
 Leonard Gelman MD, CMD
 Georgia Medical Directors Association
 Craig Gerhart
 Illinois Medical Directors Associations
 Paul Katz MD, CMD
 Keith Krein MD, MMM, CMD
 Missouri Association of Long-Term Care Practitioners
 John Morley MB, BCH
 David Nace MD, MPH, CMD
 Oklahoma Medical Directors Association
 Joseph Ouslander MD
 Julia Powell
 Barbara Resnick PhD, CRNP
 *William Smucker MD, CMDR (deceased)
 Karl Steinberg MD, HMDC, CMD
 Daniel Swagerty MD, MPH, CMD
 Michael Wasserman MD, CMD
 Peter Winn MD, HMDC, CMD

The Charter Society

(\$1000 - \$4999)

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 Michele Bellantoni MD, CMD
 Carl Bergman MD, CMD
 Colorado Society for Post-Acute and Long-Term Care Medicine
 Elizabeth Cobbs MD
 Leslie Eber MD, CMD
 Rebecca Elon MD, MPH, CMD
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 Florida Society for Post-Acute and Long-Term Care Medicine
 GAPNA Foundation
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 Johns Hopkins University School of Medicine Division of Geriatric Medicine and Gerontology
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 Thomas Lawrence MD, CMD
 James Lett MD, CMDR & Cheryl Phillips, CMDR
 Cari Levy MD, PhD, CMD
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 Mid-Atlantic Society for PALTC Medicine
 Missouri Association Of Long Term Care Practitioners
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 Arif Nazir MD, CMD
 Dallas Nelson MD, FACP, CMD
 New York Medical Directors Association
 North Central Society for Post-Acute and LTC Medicine
 Sing Palat MD, CMD
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 Diane Sanders-Cepeda DO, CMD
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(\$100 - \$249)

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2023 ANNUAL GIVING SOCIETIES

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(\$10,000 & Above)

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 Genesis LTC ACO
 Rajeev Kumar MD, FACP, CMD
 Susan Levy MD, CMD
 Merck

Moderna

Jonathan Musher MD, CMD & Ursula Musher MD
 Neurocrine Biosciences
 Otsuka America - Lundbeck Pharmaceutical, Inc
 Keith Rapp MD, CMD
 Sanofi

The Champion Society

(\$5000 - \$9999)

Georgia Medical Directors Association
 Tom Haitchoat
 Milta Little DO, CMD
 Ohio Society for Post-Acute and Long-Term Care Medicine

Optum

Patient Pattern INC.
 SAI Systems Health
 Karl Steinberg MD, HMDC, CMD
 Virginia Medical Directors Association

THE FOUNDATION FOR POST-ACUTE
AND LONG-TERM CARE MEDICINE
Industry Partner Recognition

The Foundation's Industry Advisory Board (IAB) is a flagship program that initiates and advances collaborative partnerships between AMDA, national leaders, and practitioners with industry working in PALTC medicine cultivating knowledge, advisement, and understanding between industry partners and practitioners to ultimately advance excellence in care.



Acadia is advancing breakthroughs in neuroscience to elevate life. For more than 25 years we have been working at the forefront of healthcare to bring vital solutions to people who need them most. We developed and commercialized the first and only approved therapy for hallucinations and delusions associated with Parkinson's disease psychosis. Our clinical-stage development efforts are focused on treating the negative symptoms of schizophrenia, Rett syndrome, and neuropsychiatric symptoms in central nervous system disorders.

[For more information, visit us at Acadia.com.](http://www.acadia.com)



Through science and innovation, Janssen Infectious Diseases & Vaccines aims to deliver solutions to prevent, treat and cure infectious diseases. Our efforts are focused on tackling the most complex infectious diseases, finding the right paths of intervention, and making sure they reach those in need. We have an ambitious goal—to ensure a future where we can prevent the spread of infectious diseases and eliminate the burden they place on global health.

[Learn more at janssen.com](http://www.janssen.com)



Signing on as a corporate sponsor of the PALTC Foundation underscores LTC ACO's continued effort to promote quality care for the long-term care population. LTC ACO is committed to supporting the Foundation, leveraging its expertise, resources, and data-driven insights to advance care delivery within the PALTC industry.

[For more information, visit us at ltcaco.com.](http://www.ltcaco.com)



At Merck, known as MSD outside of the United States and Canada, we are unified around our purpose: We use the power of leading-edge science to save and improve lives around the world. For more than 130 years, we have brought hope to humanity through the development of important medicines and vaccines. We aspire to be the premier research-intensive biopharmaceutical company in the world – and today, we are at the forefront of research to deliver innovative health solutions that advance the prevention and treatment of diseases in people and animals. We foster a diverse and inclusive global workforce and operate responsibly every day to enable a safe, sustainable, and healthy future for all people and communities.

[For more information, visit merck.com.](http://www.merck.com)



Moderna, Inc. is a biotechnology company pioneering messenger RNA (mRNA) therapeutics and vaccines. Moderna's mRNA platform builds on continuous advances in basic and applied mRNA science, delivery technology and manufacturing, and is allowing the research and development of therapeutics and vaccines for infectious diseases, immuno-oncology, rare diseases, cardiovascular diseases and auto-immune diseases.

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Neurocrine Biosciences is a leading neuroscience-focused, biopharmaceutical company with a simple purpose: to relieve suffering for people with great needs, but few options. We are dedicated to discovering and developing life-changing treatments for patients with under-addressed neurological, neuroendocrine, and neuropsychiatric disorders. The company's diverse portfolio includes FDA-approved treatments for tardive dyskinesia, Parkinson's disease, endometriosis*, and uterine fibroids*, as well as over a dozen mid to late-stage clinical programs in multiple therapeutic areas. For three decades, we have applied our unique insight into neuroscience and the interconnections between brain and body systems to treat complex conditions. We relentlessly pursue medicines to ease the burden of debilitating diseases and disorders, because you deserve brave science.

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We would like to offer our special gratitude to these additional volunteers who provided their gift of time and service to this past year for the benefit of the Foundation's efforts.

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