Mission

The Tufts Health Plan Foundation’s mission is to improve the health and wellness of the diverse communities we serve.
### Statements of Financial Position

<table>
<thead>
<tr>
<th></th>
<th>YEAR ENDING 12/31/16</th>
<th>YEAR ENDING 12/31/15</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ASSETS</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cash and cash equivalents</td>
<td>$1,186,832</td>
<td>$697,130</td>
</tr>
<tr>
<td>Investments:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equity securities</td>
<td>$6,058,708</td>
<td>$7,922,812</td>
</tr>
<tr>
<td>Other invested assets</td>
<td>$57,971,386</td>
<td>$58,067,937</td>
</tr>
<tr>
<td>Due from affiliates</td>
<td>$650</td>
<td></td>
</tr>
<tr>
<td>Accounts receivable, other</td>
<td>$4,025</td>
<td></td>
</tr>
<tr>
<td><strong>Total assets</strong></td>
<td>$65,221,601</td>
<td>$66,687,879</td>
</tr>
</tbody>
</table>

### Statements of Activities and Changes in Net Assets

<table>
<thead>
<tr>
<th></th>
<th>YEAR ENDING 12/31/16</th>
<th>YEAR ENDING 12/31/15</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>REVENUES</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$2,351,546</td>
<td>$1,574</td>
</tr>
<tr>
<td>Investment return</td>
<td>$36,652</td>
<td>$3,352,466</td>
</tr>
<tr>
<td><strong>Total revenues</strong></td>
<td>$2,388,198</td>
<td>$3,354,040</td>
</tr>
</tbody>
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|                    |                       |                       |
| **EXPENSES**       |                       |                       |
| Grants             | $2,922,050            | $3,228,426            |
| Employee Match Program Contributions | $539,476          | $364,606              |
| General and Administrative Costs | $1,267,318        | $827,095              |
| Total expenses     | $4,728,844            | $4,420,127            |
| (Deficit) Excess of revenues over expenses | $(2,340,646)    | $(1,066,087)          |
| Net assets at the beginning of the year | $66,224,995 | $70,153,600 |
| Change in unrealized | $2,803               | $ (2,862,518)        |
| **Net assets at the end of the year** | $63,887,152 | $66,224,995 |
2016 Grantees

Systems and Best Practices

**Bridges Together**
(Sudbury, MA)
*Building Intergenerational Bridges in 45 Communities*
To expand to 45 communities this intergenerational program that places older adult volunteers in school classrooms across the state.

**Brockton Neighborhood Health Center**
(Brockton, MA)
*Bringing Health Home*
To improve access to health promotion programs for older adults and residents in public housing.

**Elder Services of Merrimack Valley**
(Lawrence, MA)
*Healthy Living Center of Excellence*
To support this network of 90+ community-based providers that offers evidence-based programs to older adults throughout the Commonwealth.

**Friends of Yarmouth Council on Aging**
(Yarmouth, MA)
*Age-Friendly Yarmouth to Cape Cod: Continuous Improvement Plan Year 2*
To implement activities to address community needs identified by the age-friendly survey.

**Gerontology Institute at the University of Massachusetts Boston**
(Boston, MA)
*Environmental Scan of Assets and Activities Supporting Dementia-Friendly Communities in Massachusetts*
To identify dementia- and age-friendly resources, assets, and programs in Massachusetts and help build learning communities that lead to making Massachusetts a leader in the age- and dementia-friendly movements.

**Greater Boston Legal Services**
(Boston, MA)
*Elder Abuse Prevention Project of Greater Boston Legal Services*
To expand this elder abuse prevention program to four additional communities—Chelsea, Malden, Quincy, and Somerville.

**Health Resources in Action**
(Boston, MA)
*Building Massachusetts’ Statewide Capacity to Effectively Conduct Health Impact Assessments and Community Health Improvement Initiatives*
To provide three regional trainings culminating in a statewide conference that mobilizes community partners in the coordination, identification, and initiation of health impact assessments for their regions and MA.

**Massachusetts Healthy Aging Collaborative**
(Massachusetts)
*Building Capacity of the Massachusetts Healthy Aging Collaborative to Drive Change*
To provide initial support for staffing to advance the collaborative’s work, connect and align the age-friendly system, and build community capacity.

**Metropolitan Boston Housing Partnership**
(Boston, MA)
*Building Effective Hoarding Response for Boston and Cambridge Elders*
To shift municipal agencies from a punitive response to a holistic case management approach to hoarding in older adults.

**St. Elizabeth Community**
(Providence, RI)
*The WellCare Program*
To launch the nationally recognized Support and Services at Home (SASH) program, a proven best practice, in Rhode Island.

**Sustainable Southern New Hampshire Planning Commission Foundation**
(Manchester, NH)
* Becoming an Age-Friendly Community – A Step-by-Step Analysis and Guide for SNHPC Communities*
To support capacity building and the development of community plans that include age-friendly policies and practices.

**Transition House**
(Cambridge, MA)
*Community Solutions to Domestic Violence: Focus on Elders*
To expand a pilot that addresses domestic violence among older adults in Cambridge by implementing a coordinated community approach.
James Roosevelt, Jr., Leadership Fund

**Jewish Family and Children’s Services**  
(Waltham, MA)  
*Dementia-Friendly Summit*  
To collaborate with the Executive Office of Elder Affairs to convene those working on dementia-friendly initiatives to share learnings and align with age-friendly efforts.

**Whittier Street Health Center**  
(Roxbury, MA)  
*Mind/Body Wellness Intervention for Seniors*  
To implement programs taking a holistic approach to promoting healthy living and disease management for older adults.

**Policy and Advocacy**

**Citizens’ Housing and Planning Association**  
(Boston, MA)  
*Massachusetts Smart Growth Alliance*  
To engage organizations that serve older adults and people with disabilities to advocate for statewide zoning and housing development reform that creates walkable communities and increases housing options, both supporting growth of age-friendly communities.

**Dudley Street Neighborhood Initiatives**  
(Boston, MA)  
*Development Without Displacement*  
To educate, train, and support residents as advocates for policy changes that result in stable, affordable housing and long-term plans that focus on development without displacement.

**Friends of Jewish Community Housing for the Elderly**  
(Brighton, MA)  
*Housing for Seniors Advocacy Project*  
To develop/conduct research that provides evidence to advance policy changes promoting affordable senior housing that integrates supportive services.

**Health Resources in Action**  
(Boston, MA)  
*Boston Alliance for Community Health*  
To train community residents to advocate for policies, systems, and environmental changes that make communities healthier for everyone as they age.

**Healthy Waltham**  
(Waltham, MA)  
*Connections for Healthier Aging in Waltham*  
To support Waltham Connections, a collaboration of seniors and stakeholders from community organizations and city government that will focus on advocacy and develop programs to support diverse populations and address gaps in access.

**Jewish Family and Children’s Services**  
(Waltham, MA)  
*Dementia-Friendly Massachusetts Initiative*  
To advance dementia-friendly initiatives that accelerate and expand systems and grassroots programs across Massachusetts.

**Massachusetts Association of Home Care Programs/Area Agencies on Aging**  
(Bedford, MA)  
*The RIGHT Program: Rapid Integration for Good Health Transitions*  
To tackle barriers that limit care in community after a hospital discharge and advocate for improved policies and best practices that support healthy aging in community.

**Massachusetts Law Reform Institute**  
(Boston, MA)  
*Elder Food Security Project*  
To improve and refine the system used to access Supplemental Nutrition Assistance Program (SNAP) benefits and ensure that older adults in most need are able to access and retain critical benefits.

**Massachusetts Public Health Association**  
(Boston, MA)  
*Mobilizing for Prevention, Equity, and Age-Friendly Communities*  
To engage in statewide policy initiatives that support the development of age-friendly communities by addressing the social determinants of health such as access to affordable food, housing, and transportation.

**Operation A.B.L.E.**  
(Boston, MA)  
*ABLE Employer Outreach and Education*  
To develop an advocacy and public awareness campaign that strengthens employers’ understanding of the value of mature workers and expands the network of those hiring mature workers.

**Rhode Island College Foundation**  
(Providence, RI)  
*Implementation of Aging in Community Report Recommendations*  
To support specific recommendations from the 2016 Aging in Community report that includes bolstering community-based services and making Rhode Island communities more age-friendly.

**Senior Agenda Coalition**  
(Providence, RI)  
*Senior Voices for Aging in Community*  
To engage seniors and develop them as advocates for policy changes affecting their communities, specifically around transportation.
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