

# 2014 Annual Report

## Message From the President & Chairman

Dear Friends and Community Partners,

It is with great pleasure that we share with you highlights from our work in 2014. Last year we undertook a strategic planning process that reaffirmed our core mission of expanding access to health care for low-income and vulnerable people and expanded our focus areas to include access to behavioral health services and efforts to better understand the effect of social and societal factors on health outcomes. As we reflected on what we had learned, our priorities and strategies evolved, allowing us to respond to the significant health policy challenges facing our community in the most meaningful way. This new strategic plan will serve as a blueprint for our work over the next several years as we seek to make a difference and to create an impact. Here are just a few examples:

**We launched a new grant program called *Fostering Effective Integration of Behavioral Health and Primary Care*.** This major investment is supporting 10 organizations that are implementing collaborative, co-located, or integrated service models for patients with a range of medical and behavioral health needs. The cohort represents a variety of provider types – community health centers, community-based behavioral health centers, and hospital-based programs – located throughout the state. We are documenting the grantees' successes and challenges with the intent of making a longer-term investment in promising, replicable models in the future.

**We continued our role as a convener of impartial and thoughtful public discussion.** As a new governor and members of the state legislature were incoming, we commissioned a report on key priorities for MassHealth, the state's Medicaid program. Based on over 40 interviews with stakeholders and policy experts, the report provided a critical discussion around the key issues, opportunities, and policy options for MassHealth, a nearly \$14 billion program that covers 1.7 million residents. We released the report at an event attended by over 200 people to wide media acclaim.

**We made social equity and health a priority area.** Studies suggest that medical care accounts for only 20 percent of health outcomes, and there is general agreement in the public health arena that social, environmental, and behavioral factors account for 60 percent, with the other 20 percent being genetics. Yet as a nation, we continue to spend more on health care than on social services. With this as context, we commissioned nationally renowned authors/researchers Betsy Bradley and Lauren Taylor to help us create a solid evidence base linking improved health outcomes with access to non-medical supports. We also held the first in a series of Social Equity & Health events where stakeholders came together to have an informed and open dialogue about how best to serve our most at-risk neighbors.

We are as committed as ever to ensuring that people can get and afford the care they need and are excited to be complementing that work with our new focus areas of behavioral health access and social equity and health. Together, we've accomplished much, but there is still work to be done. We hope that you'll find the attached 2014 year-in-review infographic informative, and we look forward to working with you in 2015!



**Audrey Shelto**  
President

**Philip W. Johnston**  
Chair

Health reform will not be complete until we make high-quality care *affordable* as well as *accessible*. For the past 14 years, we have been working toward meaningful change in the face of dynamic and sometimes challenging policy landscapes. But our ultimate goal is clear: to see improved access, better health outcomes, and lower costs for our most vulnerable residents. Here are some recent highlights.

## 2014-2016 AREAS OF FOCUS

### COVERAGE & CARE

Coverage does not always equal care. We are committed to supporting programs that help low-income consumers obtain, keep, and use their insurance to access high-quality, affordable care. We conduct research and develop strategies to increase coverage for those most in need.



### AFFORDABILITY

Although the Commonwealth leads the nation in health insurance coverage, consumers still struggle with the cost of health care. We continue to document that impact to help ensure that our most vulnerable residents can get and afford the care they need.



### BEHAVIORAL HEALTH

Access to behavioral health is uneven, and consumers often have difficulty getting the right combination of care when they need it. We are exploring methods for expanding access and eliminating barriers to integrating behavioral and physical health care.



**EXPAND ACCESS TO HEALTH CARE FOR LOW-INCOME & VULNERABLE POPULATIONS**

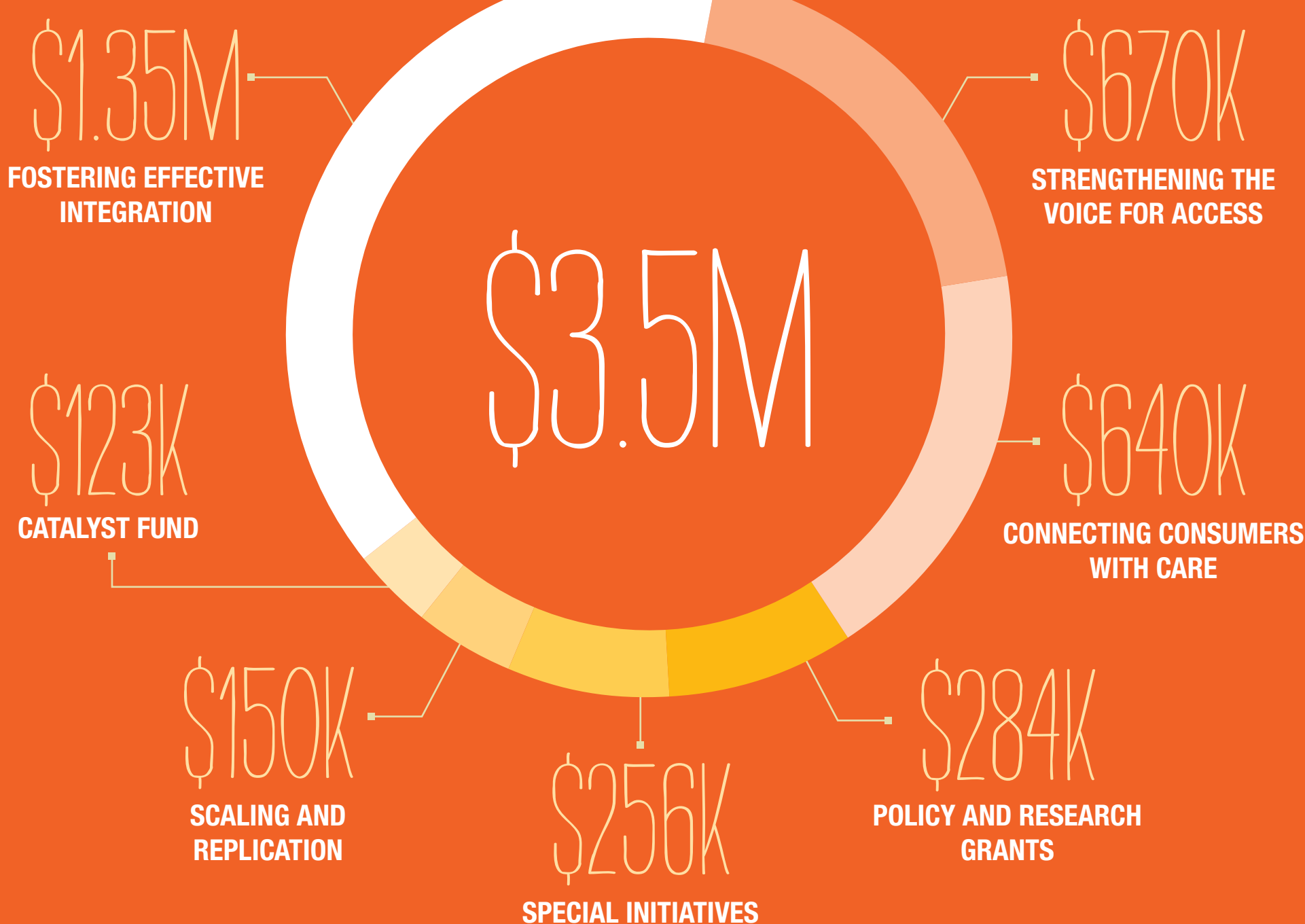
### SOCIAL EQUITY

Social, environmental, and behavioral factors account for 60 percent of health outcomes, yet we continue to spend more on medical care than on social services. Through research and grantmaking, we are examining the impact that spending on social services can have on health outcomes.



## GRANTMAKING

We organize our funding priorities into defined programs that are closely tied to our mission and areas of focus.



IMPACT

We fund programs and projects that promote sustainable improvements in health care access for low-income and vulnerable people. Through grantmaking, we also identify trends to inform our policy work and bring to scale best practices and lessons learned. Current funding priorities include integrating behavioral health care with primary care, connecting low-income patients with coverage and care, strengthening advocacy for health access, and building the capacity of community-based organizations.

## POLICY & RESEARCH

The focus of our policy and research projects is the development of effective policy solutions through impartial and timely research and analysis.



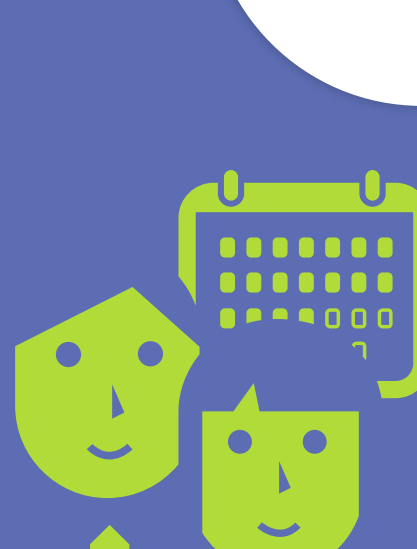
IMPACT

Our work centers on access and affordability as well as how barriers to care – whether regulatory, financial, or other – seriously impact people's health outcomes, especially among low-income and vulnerable populations. We also engage stakeholders to identify priorities for the future direction of MassHealth (Massachusetts' Medicaid program) and have released a report with the findings. Our publications are widely regarded as key resources for policy makers and those interested in Massachusetts health care issues.

## PROGRAMS

The Foundation runs three programs directly related to our mission of expanding access to health care.

The **Massachusetts Medicaid Policy Institute (MMPI)** is a **FULL-TIME POLICY PROGRAM** of the Foundation, devoted to **BROADENING THE UNDERSTANDING** of the Massachusetts Medicaid program, **MassHealth**. **MMPI PROMOTES THE DISCUSSION OF EFFECTIVE POLICY SOLUTIONS** through **EDUCATIONAL MATERIALS** and *in-depth policy papers*, and **hosting CONVENINGS & WEBINARS** attracting a **WIDE RANGE OF STAKEHOLDERS**.



**18 DAY PROGRAM**  
**19 EMERGING LEADERS**



**75 SPEAKERS**  
**12 JOURNALISTS**

RESULTING IN THE NEXT GENERATION OF COMMUNITY HEALTH LEADERS

RESULTING IN **29 NEWS STORIES**

IMPACT

How do our programs create change? The Massachusetts Medicaid Policy Institute produces independent, nonpartisan research and analysis about MassHealth, expanding understanding of this important coverage program and broadening the dialogue about ways to improve its effectiveness. The Massachusetts Institute for Community Health Leadership and the Health Coverage Fellowship expands the capacity of the media to cover issues related to health reform and access to care.

## CONVENINGS

We stay connected to the community through collaborations and convenings.



**6 CONVENINGS**



**7 LEARNING COMMUNITIES**



**4 WEBINARS**



**5 ADVISORY MEETINGS**

IMPACT

Foundation-sponsored conferences assemble stakeholders from government, advocacy, academia, and the provider community to discuss health care affordability and access, social equity and health, and the future of the MassHealth program. Our grantees participate in learning communities with peers to share best practices and address common challenges. Two webinars have provided participants with a comprehensive overview of MassHealth, and the Foundation has coordinated an advisory committee on the addition of epidemic and recovery services for the city of Boston.

Blue Cross Blue Shield of Massachusetts Foundation, Inc.  
for Expanding Healthcare Access

Statements of Activities and Changes in Net Assets  
(Dollars in Thousands)

	<b>Year Ended December 31</b>	
	<b>2014</b>	<b>2013</b>
Revenues and other support:		
Contributions	\$ 318	\$ 461
Contributions in-kind	1,481	1,099
Investment income	3,192	1,676
Net unrealized and realized gains on investments	1,582	13,794
Total revenues and other support	6,573	17,030
Expenses:		
Grants	3,473	3,434
Professional services	2,006	1,778
Salaries and benefits	1,863	1,508
Conferences, conventions, and meetings	281	132
Occupancy and equipment maintenance	170	165
Federal excise tax expense	97	309
Other administrative expenses	131	80
Total expenses	8,021	7,406
(Deficit) excess of revenues and other support over expenses and change in net assets	(1,448)	9,624
Net assets at the beginning of year	111,391	101,767
Net assets at the end of year	\$ 109,943	\$ 111,391

*See accompanying notes.*