

# PRIVATE SECTOR PRINCIPLES FOR RESULTS-DRIVEN PHILANTHROPY

SHELLEY LYFORD

**WEST HEALTH'S** unique identity, its DNA, descends directly from our founders and sole funders, Gary and Mary West. Since our launch in 2006, West Health's work has been stamped with their distinctive double helix of heart and mind: a deep commitment to improving the quality and accessibility of healthcare for America's seniors, coupled with an abiding belief in the power of best practices drawn from their hard-earned success in the private sector.

When the Wests pledged their entire fortune to the mission of successful aging, they charged us with finding bold and innovative solutions to the monumental challenges facing seniors. The urgency of this mission requires nothing less. Our rapidly growing and diverse senior population is beset by increasing disparities in income and social services, particularly in communities of color. The health outcomes of low-income seniors lag well behind those of other industrialized countries and critical social safety nets such as Medicare and Medicaid are continually underfunded and under threat.

For West Health, addressing the needs of seniors isn't simply a fiscal and political priority – it's a moral imperative. Seniors deserve our deep gratitude for sustaining our families, building our communities, and yes, fighting our wars. We owe them a lot – but nothing is more important than greater access to quality healthcare and the chance to age successfully with dignity and independence. This mission drives everything we do.

Inspired by Gary and Mary's example, we pursue our mission with equal parts idealism and pragmatism, sustained by the optimism that has always fueled successful entrepreneurs. Today, as seniors face unprecedented challenges to their health and wellbeing, we continue to be guided by these six principles honed by the Wests while building results-driven businesses.



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## **INNOVATION MEANS LEADING, NOT FOLLOWING**

Whether in the private or public sector, it's always safer to plant in the fields already cultivated by others, rather than risk breaking new ground. But the senior healthcare crisis demands bold action powered by even bigger ideas. In pursuit of breakthrough solutions, we're willing to risk failure, learn from our mistakes, and redouble our efforts.

West Health has consistently been the first mover in many sectors of healthcare services and delivery for seniors. For more than a decade, we've developed novel models of telehealth to bridge the gaps separating isolated seniors from life-sustaining health and social services. When we recognized the specialized needs of seniors in hospital emergency departments — who comprise the largest demographic among emergency room visits — we designed and built a pioneering model of geriatric emergency medicine. And when we uncovered the debilitating lack of oral healthcare services available to low-income seniors — the highest-need population which receives little or no dental care through Medicare or Medicaid — we created a first-of-its-kind Senior Dental Center that's become a model for the nation.

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## **DATA-DRIVEN SOLUTIONS REQUIRE RIGOROUS RESEARCH**

Innovative programs and services can only become the new standard of care if there is data to support their efficacy and sustainability. Our grantmaking and policymaking all begin with data-based research. At West Health, our applied medical research institute is committed to understanding and evaluating the effectiveness of existing models of care, developing new ones, and determining where greater investments can lead to improved outcomes. Additionally, we never presume to know what seniors want and need. In advance of any program launch, we conduct intensive research, beginning with the seniors we serve in our home community of San Diego.

And when they consistently told us they wanted nutritious meals and social services in a communal and easily accessible setting, we built our Senior Wellness Center near where low-income seniors live or could access through public transportation. And when seniors consistently told us they want to continue to age in place within the communities they love and call home, we built a state-of-the-art Program of All-Inclusive Care for the Elderly (PACE) center in an underserved county in northern San Diego to provide comprehensive home-based health and social services.

Our commitment to research doesn't end with the launch of a new model of care. We continuously study and analyze our outcomes data to improve our programs and increase their impact on senior health and well-being.

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### **A PROGRAM IS ONLY SCALABLE IF IT'S FINANCIALLY STABLE**

Vision is necessary but not enough to drive lasting change. We can't increase access to healthcare for seniors unless the models of care we create are cost-effective. Only by lowering the cost of care can we increase access for the growing population of older Americans.

In the nonprofit sector, West Health has been a leader in increasing the value of healthcare services and delivery for seniors, and as our senior population grows, so does the imperative to deliver more and better care for less money. Telehealth has finally entered mainstream medical practice in the wake of the coronavirus pandemic — but it will only thrive beyond this public health crisis if it costs less and delivers better quality care than office-based practice, while also fairly compensating providers. That's why West Health is investing in applied medical research to identify the models of telehealth that will be sustainable for seniors, whether they live in assisted or independent living, in urban or rural communities.

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### **THE SMARTEST ORGANIZATIONAL STRUCTURE IS THE ONE THAT BEST SERVES THE MISSION**

West Health's unique organizational structure is designed to integrate our programs and maximize their impact on senior healthcare. West Health's Foundation, Institute, and Policy Center are technically separate entities, all with their own governance. But a key part of my job is to ensure that our three arms work seamlessly and that our impact exceeds the sum of our parts. I think of our three tightly woven strands as the rope that anchors West Health securely to its mission. Our Institute ensures that our Foundation's grant-making is informed by sound research and data, while our Policy Center circulates our best ideas to thought leaders and partners who help scale our most fruitful programs for nationwide benefit.

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## THE RACE BELONGS TO THE SWIFT, AND THE NIMBLE

Make no mistake, we are in a race against a lethal pandemic that targets seniors for its worst outcomes, a relentless aging clock that is running ahead of our country's planning, and an ever-fiercer political competition for resources. Only if we persevere in our commitment to innovation, data-driven research, solution-based philanthropy, and bold policymaking can we blaze a path forward on behalf of seniors.

At the end of each year, when I review and reassess our strategic goals and partnerships, I find myself returning to the Wests' guiding principles. Beyond their generous philanthropy, I credit our founders with bequeathing to us their most valuable asset: a powerful blend of idealism, pragmatism, and entrepreneurial zeal that has long inspired visionary leaders and powered movements for social change.

“ I'm very proud of the work we are doing. Hopefully as time goes on, more and more people will look at what we have accomplished and will **join the crusade of helping low-income elderly people** who don't have a lot of help and support either from the philanthropic world or from government. ”

**GARY WEST**



### ABOUT SHELLEY LYFORD

Shelley Lyford is president and chief executive officer of West Health and oversees the use of applied medical research, policy, advocacy, and outcomes-based philanthropy to improve healthcare for seniors and lower costs. Under her leadership, the Gary and Mary West Foundation has awarded over 600 grants to date totaling approximately \$225 million for applied medical research, policy initiatives and community support and social services for seniors and their caregivers. At the Gary and Mary West Health Institute, Shelley leads research on a wide range of healthcare issues affecting seniors and their families. The data generated is used to provide evidence for healthcare providers, policymakers and communities to make more informed decisions about high-quality, affordable healthcare delivery models and support services to enable successful aging in America.

Lyford serves as a commissioner on the California Commission on Aging, advising federal, state and local officials, on the issues, policies, and regulations that affect California's seniors. Lyford was also appointed by Governor Newsom to the Stakeholder Advisory Committee to guide the creation of the state's Master Plan for Aging. Lyford serves as vice-chair of the board of directors for Civica Rx, a not-for-profit generic drug company helping patients by addressing shortages and lowering the high prices of lifesaving medications. Lyford is the board chair for the Gary and Mary West Senior Dental Center, a board director with the Gary and Mary West Foundation and West Health Institute, a board member of the San Diego Regional Chamber of Commerce and a board member of the San Diego Regional Economic Development Corporation, where she promotes San Diego as an epicenter for innovation and research.