

TOWARD A MORE EFFICIENT AND EFFECTIVE SYSTEM OF FINANCING LONG-TERM CARE

Barbara Jordan Conference Center
1330 G Street, NW Washington, DC 20005

JUNE 11, 2007
10:00 AM TO 3:30 PM

10:00: Welcome

10:15: WHY THE CURRENT PUBLIC-PRIVATE PARTNERSHIP NEEDS TO CHANGE

Moderator and Presenter: Robert B. Friedland

- Facing long-term care in the future

Commentary:

Implications for Families:	Susan Dentzer
Implications for Financing:	William Scanlon

Open discussion

11:30: TOWARD A BETTER PUBLIC-PRIVATE PARTNERSHIP: THE OPTIONS (PART I)

Moderator: Gary Claxton

- Public policies to encourage the purchase of private long-term care insurance

John Cutler	Sam Morgante
Mark Warshawsky	Mark Meiners
	Jim Knickman

Open Discussion

12:30: **Lunch**

1:00: TOWARD A BETTER PUBLIC-PRIVATE PARTNERSHIP: THE OPTIONS (PART II)

Moderator: Gary Claxton

- Public policies to expand public insurance of long-term care
Marty Lynch
Christine Bishop
Ann Tumlinson
Bing Chen
Barbara Manard
Richard Johnson

Open Discussion

2:00: MAKING CHOICES: TOWARD A MORE EFFICIENT AND EFFECTIVE LONG-TERM CARE SYSTEM

Moderator: William Scanlon

- Comparison of Alternative Approaches: Judy Feder

Roundtable Discussion

Gail Wilensky
Stephen Somers
Diane Rowland

Chris Jennings
Karen Ignagni

Open Discussion

3:30: Closing

Moderators and Presenters

Christine E. Bishop, Ph.D.

Atran Professor of Labor Economics at the
Heller School for Social Policy and
Management
Brandeis University

Yung-Ping (Bing) Chen, Ph.D.

Professor of Gerontology
University of Massachusetts Boston

Gary Claxton

President and the Director of the Health
Care Marketplace Project
Henry J. Kaiser Family Foundation

John A. Cutler

Senior Policy Analyst
US Office of Personnel Management

Susan Dentzer

Correspondent
The NewsHour with Jim Lehrer

Judy Feder, Ph.D.

Professor and Dean of the Georgetown
Public Policy
Georgetown University

Robert B. Friedland, Ph.D.

Associate Professor, Health Systems
Administration
Director, Center on an Aging Society
Georgetown University

Karen Ignagni

President and Chief Executive Officer
America's Health Insurance Plans

Christopher Jennings

President,
Jennings Policy Strategies, Inc.

Richard Johnson, Ph.D.

Principal Research Associate
The Urban Institute

James R. Knickman, Ph.D.

President and Chief Executive Officer
New York State Health Foundation

Marty Lynch, Ph.D.

Chief Executive Officer
LifeLong Medical Care

Barbara Manard, Ph.D.

Health Policy Researcher and Consultant
American Association of Homes and
Services for the Aging

Mark R. Meiners, Ph.D.

Professor of Health Policy
College of Health and Human Services
George Mason University

Samuel Morgante

V.P. Government Relations
Genworth Financial

Diane Rowland, Sc.D.

Executive Vice President
Henry J. Kaiser Family Foundation

William Scanlon, Ph.D.

Senior Policy Advisor
Health Policy R&D

Stephen A. Somers, PhD

President
Center for Health Care Strategies

Anne Tumlinson

Consultant
Avalere Health

Mark J. Warshawsky, Ph.D.

Director, Retirement Research
Watson Wyatt Worldwide

Gail Wilensky, Ph.D.

Senior Fellow
Project HOPE

Christine E. Bishop

Christine Bishop is the Atran Professor of Labor Economics at the Heller School for Social Policy and Management, Brandeis University; Director of the Ph.D. program at the Heller School; and a member of the research staff at the Schneider Institute for Health Policy. She is a health economist who applies microeconomics to policy-related problems in health services supply, demand, and financing. She earned her doctorate in Economics from Harvard University, and has been elected a Fellow of the Association for Health Services Research.

Dr. Bishop has extensive research experience in the economics of long-term and post-acute care. Her studies in long-term care have been concerned with both provider and recipient behavior, considering costs, production efficiency, reimbursement, financing, and utilization of nursing homes and home health services. She is collaborating with the training fund of the Service Employees International Union of New York City to study their labor-management partnership to transition nursing homes to person-centered care. She is using the first nationally representative survey of nursing assistants to conduct an analysis of nursing assistant job satisfaction. She headed a project, supported by the Better Jobs Better Care program of the Robert Wood Johnson Foundation and Atlantic Philanthropies, concerned with the role of the Certified Nursing Assistant in the provision of nursing home care. The study examined how organizational factors (leadership, care philosophy) shape the mechanisms (human resources practices, staffing and scheduling patterns, participation in decision-making) that affect job satisfaction and workers' ability to provide good care. Her current research concerning the LTC workforce builds on her training as a labor economist, and early research and publications on nursing labor markets. Past studies in long-term care and health services include studies of long-term care insurance, global budgeting, nursing home payment, and home health visit content.

Professor Bishop has also conducted analysis to compare private long-term care insurance claimants to others receiving nursing home and home care, in a project funded by RWJ-HCFO. She was Principal Investigator of a project funded under contract to Centers for Medicare and Medicaid Services (CMS) to conduct a study of the impact of repeal of the Boren Amendment on Medicaid beneficiaries' access to and quality of nursing home care; this built on a study funded by The Commonwealth Fund concerned with the effect of nursing home payment methods and levels on access to care for Medicaid beneficiaries. Her research on home health policy has resulted in publications concerned with Medicare payment, visit content, and productive efficiency. Among Dr. Bishop's publications in the long-term and post-acute care area are "Efficiency of Home Care: Notes for an Economic Approach to Resource Allocation," in *Journal of Aging and Health*, "The Medicare Home Health Benefit: Implications of Recent Payment Changes" (with others) in *Journal of Long Term Home Health Care*, and "Where are the Missing Elders? The Decline in Nursing Home Utilization, 1985-1995," published in *Health Affairs*.

Because population health and disability are at the root of demand for long-term care (LTC) services, and because preventive interventions may save future LTC costs, Dr. Bishop has undertaken investigations of trends and causal factors for disability in the elderly, including access to prescription drugs. She is the Principal Investigator of a study of the impact of the Medicare Modernization Act on dually eligible beneficiaries, funded by CMS; the first phase of this study investigated waived programs that integrate care for dual eligibles in three states (MA, MN, WI), with a focus on prescription drugs and coordination of care, and a second phase will provide an evaluation of the impact of Part D for all duals. She is heading the data analytic portion in a CMS-funded project to evaluate state pharmacy assistance programs in Illinois and Wisconsin, developing methods to assess whether better access to prescription drugs can avert

disability and thus nursing home use as well as reduce acute care expenditures covered by Medicare, and is involved in a related project funded by RWJ/HCFR comparing benefit design in the two states. As part of this study, she has investigated the impact on access to prescription drugs of a feature of the Illinois drug coverage, a “soft cap” for spending above which enrollees face a larger copayment amount for drugs. She leads a Brandeis team that will use Medicare claims data to study the effect of physician practice type and nursing home characteristics on the incidence of adverse health events for Medicare beneficiaries with chronic illness. She also serves as Principal Investigator for a CMS evaluation of a demonstration expanding Medicare coverage to include low-vision rehabilitation services provided in beneficiaries’ homes.

Dr. Bishop has been a member of the staff of the Institute staff since 1979. She teaches Health Economics has been Director of the Ph.D. Program of the Heller School since January 2003. She is Convener of the Economics of Aging Interest Group for the Gerontological Society of America, served as Theme Leader for Long Term Care for the 2005 AcademyHealth Annual Research Meeting, and is a member of the Heinz Dissertation Award committee of the National Academy of Social Insurance. Previously she was an assistant professor at Boston University School of Management, and was a post-doctoral Fellow at the Harvard Center for Community Health and Medical Care.

Yung-Ping (Bing) Chen

Yung-Ping (Bing) Chen, Ph.D., is a professor of gerontology who holds the Frank J. Manning Eminent Scholar's Chair in Gerontology in the John W. McCormack Graduate School of Policy Studies at the University of Massachusetts Boston. Recipient of a Warren C. Scoville Distinguished Teaching Award at UCLA, his research interests are in funding reforms of Social Security and long-term care; private pension coverage; home equity conversion/reverse mortgages; and phased retirement. As a delegate or consultant or both, he participated in the White House Conferences on Aging (1971, 1981, 1995, and 2005) and the White House Conference on Social Security (1998). He also served on the expert panel of the 1979 Advisory Council on Social Security. A fellow in the Gerontological Society of America, a founding member of the National Academy of Social Insurance, and a fellow in the World Demographic Association, Chen is a graduate of the National Taiwan University and received his Ph.D. in economics at the University of Washington, Seattle. He has also had training in law and in mental health sciences.

Gary Claxton

Gary Claxton is a Vice President and the Director of the Health Care Marketplace Project at the Henry J. Kaiser Family Foundation. The Project provides information, research, and analysis about trends in the health care market and about policy proposals that relate to health insurance reform and our changing health care system. Prior to joining the Foundation, Mr. Claxton worked as a senior researcher at the Institute for Health Care Research and Policy at Georgetown University, where his research focused on health insurance and health care financing. From March 1997 until January 2001, Mr. Claxton served as the Deputy Assistant Secretary for Health Policy at the U.S. Department of Health and Human Services, where he advised the Secretary on health policy issues including: improving access to health insurance, Medicare reform, administration of Medicaid, financing of prescription drugs, expanding patient rights, and health care privacy. Other previous positions include serving as a consultant for the Lewin Group, a special deputy in the Office of the Assistant Secretary for Planning and Evaluation, an insurance analyst for the National Association of Insurance Commissioners, and a health policy analyst for

the American Association of Retired Persons.

John A. Cutler

John began working for the US Office of Personnel Management (OPM) in October 2000 soon after President Clinton signed legislation authorizing the creation of a long term care insurance benefit for federal employees, including the military, retirees, and their spouses. He currently is a Senior Policy Analyst for OPM on health, long term care, disability and retirement matters, but prior to that had major responsibility as architect and Project Leader for the Federal Long Term Care Insurance Program.

From 2005 to mid-2006 he was on temporary detail to the Center for Planning and Policy Development with the U.S. Administration on Aging (AoA). He was responsible for assisting with the re-authorization of the Older Americans Act and Long Term Care Awareness Campaign sponsored by the U.S. Department of Health and Human Services (HHS). The new National Clearinghouse for Long-Term Care Information, found at www.longtermcare.gov

Prior to coming to OPM, John served as a Health Policy Analyst in the Office of the Assistant Secretary for Planning and Evaluation (ASPE) at HHS. He held this position from March 1997 to October 2000. He had responsibility for policy and research across a number of areas, including long-term care financing and insurance. John was also responsible for various issues involving Medicare, acute health care, aging and disability issues.

From 1989 to 1997, John worked for AARP, with responsibility for regulatory and compliance matters involving AARP's insurance and financial products. Other employment includes four years as a partner in private practice in a Washington, DC law firm, a stint as staff counsel for a congressional commission dealing with the US territories, and staff attorney with a capital goods trade association.

John holds a BA degree from the University of Virginia in Government and Foreign Affairs (1975), and a Juris Doctor from the University of Georgia (1978). He is an active member of the Bar in the District of Columbia and Virginia.

Susan Dentzer

Susan Dentzer is an on-air correspondent with PBS' "The NewsHour with Jim Lehrer," where she leads a unit dedicated to providing in-depth coverage of health care, health policy and Social Security reform. The health unit, begun in 1998, was awarded the 2000 Robinson Electronic Media Award by the American Psychiatric Association for its report on schizophrenia. The unit is funded by a grant from the Henry J. Kaiser Family Foundation.

Prior to joining "The NewsHour" in July 1998, Dentzer was chief economics correspondent and economics columnist for *U.S. News & World Report*, where she served from 1987 to 1997. In a series of columns and stories for *U.S. News*, she reported extensively on the debate over reforming and partially "privatizing" Social Security and over such health policy issues as regulation of managed care. Before joining *U.S. News*, Dentzer was at *Newsweek*, where she was a senior writer covering business news until 1987. She has also been a frequent contributor to such publications as *Modern Maturity* and *Working Woman* magazines.

Dentzer's work in television has included appearances as a regular analyst on ABC's "Nightline" and PBS' "Washington Week in Review." She has also been a panelist on such CNN shows as "Late Edition," "Inside Politics" and "CNN & Company," as well as on "The McLaughlin Group," "FOX Morning News," and C-SPAN.

Dentzer's writing has earned her several fellowships. As a Nieman Fellow at Harvard University during the 1986-87 academic year, she studied health economics and other disciplines. As a US-Japan Leadership Program Fellow in 1991, Dentzer conducted research on US-Japan economic relations and the effects of the aging Japanese population. She detailed her findings in a series of stories for *U.S. News*.

A magna cum laude graduate of Dartmouth College, Dentzer is the chairman of the Dartmouth board of trustees. She is also a trustee of the Dartmouth-Hitchcock Medical Center and a director of the Japan Society of New York. She holds an honorary Master of Arts degree from Dartmouth and an honorary doctorate of humane letters from Muskingum College, New Concord, Ohio.

Judy Feder

Judy Feder is Professor and Dean of the Georgetown Public Policy Institute and was the 2006 Democratic nominee for Congress in Virginia's 10th Congressional District. She is one of the nation's leaders in health policy--most particularly, in efforts to understand and improve the nation's health insurance system. A widely published scholar, her three decades of policy research began at the Brookings Institution, continued at the Urban Institute, and, since 1984, has flourished at Georgetown University. Her expertise on the uninsured, Medicare, Medicaid, and long-term care is regularly drawn upon by members of Congress, Executive officials, and the national media.

Feder has also held leadership policy positions, both in the Congress and in the Executive Branch. As staff director of the congressional Pepper Commission (chaired by Senator John D. Rockefeller IV), Feder is widely credited with setting the stage for the health reform debate of the 1990s. In 1993, she was appointed to the Department of Health and Human Services, where she worked to expand health insurance coverage, effectively manage Medicare and Medicaid, and assure the safety of food and drugs.

Feder today pursues her policy leadership first and foremost by educating future policy leaders at Georgetown's Public Policy Institute. She continues her research as co-director (with Sheila Burke) of the Georgetown University Long-term Care Financing Project and as senior advisor to the Kaiser Family Foundation's Commission on Medicaid and the Uninsured.

Feder is an elected member of the Institute of Medicine, the National Academy of Public Administration, and the National Academy of Social Insurance; a former chair and board member of AcademyHealth; a board member of the National Campaign to Prevent Teen Pregnancy and the Center for American Progress Action Fund Committee. She is also a member of the National Research Council's Standing Committee on Research and Evidentiary Standards, the Robert Wood Johnson Health Policy Fellowships Program Advisory Board, and the Hamilton Project's Advisory Council.

Feder is a political scientist, with a B.A. from Brandeis University (1968) and a Master's (1970) and Ph.D. (1977) from Harvard University.

Robert B. Friedland

Robert B. Friedland is an Associate Professor in the Department of Health Systems Administration and the Director of the Center on an Aging Society at Georgetown University.

The Center is a non-partisan public policy institute that examines the issues that affect younger and older families and, in particular, the impact of changing demographics on employment, income, health and long-term care. Friedland has written on issues pertaining to the financing and delivery of health care and long-term care and retirement income security. His book *Facing the Costs of Long-Term Care*, was awarded the 1992 Elizur Wright Award by the American Risk and Insurance Association.

Friedland has had a wide range of research and public policy experience, including Chief Economist for Maryland's Medicaid program; Senior Research Associate at the Employee Benefit Research Institute; Director of the American Association of Retired Person's Public Policy Institute; Research Director, National Academy of Social Insurance; and Economist on the staff of the U.S. Bipartisan Commission on Comprehensive Health Care, better known as the Pepper Commission.

Friedland is on the board of the National Academy for State Health Policy, The American Bar Association, Commission on Law and Aging, the Advisory Board of the Health Assistance Partnership, Long-Term Care Insurance Education Foundation, and the Editorial Board of *Aging Today*. Friedland is a member of the National Academy of Social Insurance and a fellow in AcademyHealth. Friedland teaches Health Care Economics, Statistics, and Research Methods in Health System Administration in the Masters of Science Health Systems Administration program at Georgetown University.

Karen Ignagni

As President and Chief Executive Officer of America's Health Insurance Plans (AHIP), Karen Ignagni is the voice of health insurance plans, representing members that provide health care, long-term care, dental and disability benefits to more than 200 million Americans.

AHIP was formed in late 2003 as a result of a merger between the American Association of Health Plans (AAHP) and Health Insurance Association of America (HIAA).

Ms. Ignagni led AAHP and, since joining the organization in 1993, she has won many accolades for her leadership.

Washingtonian named her one of the Top Three "Top Guns" of all trade association heads. Modern Healthcare magazine routinely ranks her among the 100 Most Powerful People in Healthcare. The New York Times wrote, "In a city teeming with health care lobbyists, Ms. Ignagni is widely considered one of the most effective. She blends a detailed knowledge of health policy with an intuitive feel for politics." Fortune described the political program Ms. Ignagni spearheaded at AAHP as "worthy of a presidential election bid." For the past several years, the Hill Newspaper has consistently ranked Ms. Ignagni among Washington's most effective lobbyists. Ms. Ignagni regularly testifies before Congress on key federal legislation. In recent years, she has appeared before Senate and House committees on matters ranging from health insurance plans' role in homeland security to Medicare reform to patient protection issues

and access to health care coverage issues.

Ms. Ignagni has authored more than 90 articles on a wide range of health care policy issues, including pieces published in The New York Times, USA Today, New York Daily News, The Washington Times, Institutional Investor, New England Journal of Medicine, Health Affairs, Modern Healthcare and Physician's Weekly. A recognized industry spokesperson, Ms. Ignagni appeared on the national network newscasts on ABC, CBS, NBC, and FOX. Ms. Ignagni has also shared her insights on leading cable shows such as CNN's Inside Politics, MSNBC's Hardball, C-SPAN's Washington Journal, and CNBC's Power Lunch and Capital Report.

Most recently, Ms. Ignagni was honored by the Sons of Italy Foundation with their 2005 Lifetime Achievement Award for Excellence in Association Management. In recognition of her leadership on health care issues, Ms. Ignagni has been invited to serve on several boards, including the Board of Columbia University's School of Nursing and the Advisory Board for The Health Industry Forum – a meeting of thought leaders designed to inform innovative health care policy and practice.

Prior to joining AAHP in 1993, Ms. Ignagni directed the AFL-CIO's Department of Employee Benefits. In the 1980s, she was a Professional Staff Member on the U.S. Senate Labor and Human Resources Committee, preceded by work at the Committee for National Health Insurance and the U.S. Department of Health and Human Services.

Christopher Jennings

Chris Jennings is a more than two decade-long health policy veteran of the White House, Congress and the private sector. He currently serves as president of Jennings Policy Strategies (JPS), Inc., a nationally-respected health policy and advocacy consulting firm in Washington, D.C.

JPS, Inc. provides policy analysis, strategic guidance and coalition building advice to clients who share a commitment to affordable, accessible and accountable health care. Clients include businesses (e.g., General Motors), public employers (e.g., CalPERS), labor organizations (e.g., AFL-CIO and SEIU), consumer groups (e.g., AARP and the Partnership for Women & Families) and foundations (e.g., the Clinton Global Initiative).

White House Senior Health Care Advisor – 1993-2001

Prior to founding JPS, Inc., Mr. Jennings served in the White House as the Senior Health Care Advisor to President William Jefferson Clinton at the Domestic Policy and National Economic Councils. During his tenure there, Mr. Jennings made significant contributions toward the enactment of major, bipartisan health legislation including the Children's Health Insurance Program (CHIP), the Health Insurance Portability and Accountability Act, the Mental Health Parity Act, the Food and Drug Administration Modernization Act, the Work Incentives Improvement Act, and the tripling of funding for international AIDS programs for prevention, care, treatment and health infrastructure. Recognizing his work at the White House, the National Journal designated Mr. Jennings as one of Washington's 100 most influential individuals throughout the entire Federal government.

As the President's Senior Health Policy Advisor, he was charged with developing and implementing the Administration's health care policy. In this capacity, Mr. Jennings coordinated and oversaw the health policy work of numerous Federal agencies, including the Office of

Management and Budget and the Departments of Health and Human Services, Treasury, and Labor. He also had lead responsibility for communicating and advocating Administration health policy to the Congress, state and local governments, health care interest groups, and the media. In 1993 and 1994, he served as the Senior Advisor to Administrator of the then Health Care Financing Administration. In this capacity, he served concurrently as the congressional liaison for First Lady Hillary Rodham Clinton providing assistance for her testimony before five committees and staffing her for hundreds of meetings with members of Congress as she advocated for affordable, quality health insurance for all Americans.

Congressional Health Care Advisor – 1983-1993

Prior to joining the Clinton Administration, Mr. Jennings served as Committee staff for three United States Senators (Glenn, Melcher, and Pryor) over the course of almost ten years on Capitol Hill. As Deputy Staff Director of the Senate Aging Committee for Chairman David Pryor (D-AR), he staffed the Senator before the Finance Committee and the “Pepper Commission.” He also coordinated Senator Pryor’s legislative initiatives on health insurance affordability and access, long-term care, rural health, and prescription drug coverage and cost containment.

Richard W. Johnson

Richard W. Johnson, a principal research associate at the Urban Institute, is an economist specializing in health and income security at older ages. Much of his research focuses on long-term care, including studies of the demand for private long-term care insurance, how families choose among different types of supportive services for frail elders, and how the demand for long-term care services will likely evolve over the next 40 years. He has written extensively about older Americans’ caregivers and the economic burden of providing unpaid elder care. Dr. Johnson also is an expert on retiree health insurance and employment at older ages. He received an A.B. from Princeton University and a Ph.D. from the University of Pennsylvania, both in economics.

James R. Knickman

An active philanthropy executive, scholar, and community leader, James R. Knickman comes to the New York State Health Foundation from the Robert Wood Johnson Foundation where he served as Vice President for Research and Evaluation for the past fourteen years. He is a national expert on health policy and a leading contributor to literature on assessing the impact of philanthropic and social investments on health care improvement.

Knickman was born in Queens, attended college at Fordham University in the Bronx, and taught for sixteen years at New York University in Manhattan. While at NYU, he was actively engaged in community service directed at improving health care delivery to vulnerable populations. He served on a wide range of advisory boards and published extensive research on issues related to improving services for homeless families, frail elders, and individuals with HIV. Knickman is the co-author of a widely used textbook on health policy and management.

Currently, Dr. Knickman serves as chairman of the Robert Wood Johnson Health System in New Brunswick, New Jersey. Before this, Knickman chaired the New Jersey Department of Health’s Cardiac Health Advisory Council. He also is a past board member of AcademyHealth in Washington, DC and is on the editorial boards of the Milbank Quarterly and Inquiry.

Knickman received his PhD in Public Policy Analysis from the University of Pennsylvania.

Marty Lynch

Marty Lynch is the Chief Executive Officer of LifeLong Medical Care, a Gray Panther founded community health center group in Berkeley and Oakland, California, which specializes in care for the elderly, the homeless, and other special populations. Lynch is also a Lecturer at the School of Social Welfare, University of California, Berkeley, and a Researcher at the Institute for Health and Aging at the University of California, San Francisco. He received his Ph.D. in Social and Behavioral Sciences from the University of California, San Francisco and an MPA from the Kennedy School of Government at Harvard. Lynch's research and writing interests include Medicare and Medicaid policy, home and community-based long term care financing and delivery models, consumer empowerment issues in chronic care, and disabled elders in managed care.

Barbara Manard

Barbara Manard joined the American Association of Homes and Services for the Aging (AAHSA) in 2003 as Vice President for Health/LTC Strategies, focusing on a range of financing, quality, and information technology issues. She serves as staff lead for the development of AAHSA's proposal for a new national system of LTC financing and authored its foundational analysis *Financing Long Term Care: A Framework for America* (www.aahsa.org/advocacy/documents/Finance_Cabinet_Report_06.pdf).

Dr. Manard is a nationally recognized expert in post acute and long term care payment and services with over twenty-years of experience in the field. Her recent work includes serving on the Institute of Medicine's "Pay for Performance" subcommittee in its work for Congress on that topic. Prior to joining AAHSA, Dr. Manard developed and/or evaluated Medicaid payment systems in over half the states for nursing facilities, home and community-based services, ICFs/MR, and/or hospitals. She has completed numerous policy studies including an award-winning study of Subacute Care (for HHS), an evaluation of the cost-effectiveness of the Medicare Hospice Benefit (for HHS), an analysis of the repeal of the Boren Amendment (for the Commonwealth Fund), a report on payment systems' effect on nurse staffing in nursing facilities (for CMS), and a report on quality indicators in nursing facilities (for AARP).

From 1981-1996 Dr. Manard served as a Vice President of The Lewin Group, managing a substantial practice in LTC issues, prior to resigning that position to form an independent research and consulting firm, The Manard Company. Prior to joining The Lewin Group, Dr. Manard served as a Policy Analyst at ASPE and as an Assistant Professor of Sociology at The University of California (Riverside). She received her Doctorate in Sociology from the University of Virginia, a Certificate in Health Planning from the U. VA. School of Medicine, and an AB from Vassar College.

Mark R. Meiners

Mark R. Meiners, Ph.D., is a Professor of Health Policy in the College of Health and Human Services at George Mason University. Dr. Meiners specializes in the areas of aging and health

with emphasis on financing and reimbursement issues. He is nationally recognized as one of the leading experts on financing and program development in long-term care. Among his noteworthy recent accomplishments is his leadership of the Robert Wood Johnson Foundation (RWJF) Medicare/Medicaid Integration Program, an initiative designed to help states develop new systems of care that better coordinate acute and long-term care. In addition he has led the RWJF Partnership for Long-Term Care, an innovative state-based long-term care insurance program, since its beginning in 1987. His path-breaking research on long-term care insurance has been a major catalyst to the current interest in this topic and his work on Medicare/Medicaid integration has helped advance chronic care improvement strategies for all aged and disabled populations. He holds a Ph.D. and M.A. in economics from Georgetown University and a B.A. in economics with distinction from the University of Wisconsin.

Samuel Morgante

Sam Morgante is part of Genworth Financial's Washington, DC Government Relations team, leading the company's advocacy activities on long term care. Previously, Mr. Morgante was Vice President of Product Development for the Long Term Care Insurance Division of Genworth's predecessor, GE Capital Assurance in San Rafael, California. In that capacity he managed the development and implementation of all Long Term Care insurance products.

Mr. Morgante has provided expertise and testimony to numerous state and federal government efforts on Long Term Care. He is involved in a number of trade association activities in Washington and in the state capitals. Mr. Morgante has chaired both the Long Term Care Insurance Committees at America's Health Insurance Plans (AHIP) and at the American Council of Life Insurers (ACLI). He also serves on the Board of the New York State Partnership for Long Term Care and was selected as a delegate to the 2005 White House Conference on Aging. Mr. Morgante recently served on the Aging Transition Work Group for Maryland Governor Martin O'Malley.

His background includes senior staff positions with the New York State Legislature. Mr. Morgante graduated from the State University of New York at Binghamton and he received a Masters Degree from Columbia University's Graduate School of Business.

Diane Rowland

Diane Rowland is the Executive Vice President of the Henry J. Kaiser Family Foundation and the Executive Director of the Kaiser Commission on Medicaid and the Uninsured. She is also an adjunct Professor in the Department of Health Policy and Management at the Bloomberg School of Public Health of the Johns Hopkins University. Dr. Rowland is a noted authority on health policy, Medicare and Medicaid, and health care for low-income, elderly, and disadvantaged populations and has published widely on these subjects. She is a nationally recognized expert with a distinguished career in public policy and research. Her federal health policy experience includes service on the staff of the Subcommittee on Health and the Environment of the Committee on Energy and Commerce in the House of Representatives of the U.S. Congress, as well as senior health policy positions in the Department of Health and Human Services in the Office of the Secretary and the Health Care Financing Administration. She is a member of the Institute of Medicine, a founding member of the National Academy of Social Insurance, Past President and Fellow of the Association for Health Services Research, and a senior advisor to the Brookdale Foundation Fellowship in Gerontology. She has served as a national expert on the

Governor's Health Reform Task Force in Louisiana, the Secretary's Advisory Committee on Infant Mortality, and the Commonwealth Commission on the Future of Health Insurance and Commission on Women's Health. Dr. Rowland holds a Bachelor's degree from Wellesley College, a Masters in Public Administration from the University of California at Los Angeles and a Doctor of Science in health policy and management from the Johns Hopkins University.

William J. Scanlon

William Scanlon is a senior policy advisor with *Health Policy R&D*. He serves as a consultant to the National Health Policy Forum and is a Research Professor with the Institute for Health Care Research and Policy, Georgetown University and an affiliated faculty member of the Institute for Policy Studies, The Johns Hopkins University. He is also currently a member of the Medicare Payment Advisory Commission, the National Committee on Vital and Health Statistics, the National Commission for Quality Long-Term Care, and the White House Conference on Aging Advisory Committee. Until April 2004, he was the Managing Director of Health Care Issues at the U.S. General Accounting Office (GAO). He has been engaged in health services research since 1975. Before joining GAO in 1993, he was the Co-Director of the Center for Health Policy Studies and an Associate Professor in the Department of Family Medicine at Georgetown University and had been a Principal Research Associate in Health Policy at the Urban Institute. At GAO, he oversaw Congressionally requested studies of Medicare, Medicaid, the private insurance market and health delivery systems, public health, and the military and veterans' health care systems. His research at Georgetown and the Urban Institute focused on the Medicare and Medicaid programs, especially provider payment policies, and the provision and financing of long-term care services. Dr. Scanlon has published extensively and has served as frequent consultant to federal agencies, state Medicaid programs, and private foundations. He has a Ph.D. in Economics from the University of Wisconsin-Madison.

The above is my all purpose blurb. Of potential relevance to our work on NCVHS, my economics training concentrated on econometrics and statistics. My early research (through the mid-80s) involved extensive use of administrative data (Medicare and Medicaid claims, certification and cost reports) and of the major NCHS surveys. My later work before GAO involved more original data collection, surveys as part of program evaluations and participation in the design of the Disability Supplement to the National Health Interview Survey.

Stephen Somers

Stephen A. Somers, PhD, is the President of Center for Health Care Strategies (CHCS), which he founded in 1995 with a major grant on Medicaid managed care from the Robert Wood Johnson Foundation (RWJF). As CEO of CHCS, he is responsible for the organization's growth into a nationally recognized center of expertise on best practices in managed care for beneficiaries of this country's safety-net health coverage programs. CHCS now receives support from multiple philanthropies, corporation community benefit programs and the federal government.

Prior to starting CHCS, Dr. Somers was an Associate Vice President and Program Officer at the Robert Wood Johnson Foundation. Before joining the Foundation, Dr. Somers was a staff member at the U.S. Senate Special Committee on Aging and legislative assistant to U.S. Senator John Heinz of Pennsylvania. Dr. Somers serves as a Visiting Senior Research Scientist and Lecturer at Princeton University's Woodrow Wilson School of Public and International Affairs. He earned his PhD in the Politics of Education from Stanford University.

Anne Tumlinson

Anne Tumlinson is a consultant with nearly two decades of experience in long-term care financing policy. Most recently, she directed the Post-Acute and Long-Term Care Practice at Avalere Health, where she conducted and oversaw research and analysis on post-acute and long-term care policy for government, foundation, and commercial clients. In this capacity, she focused on a wide variety of long-term care financing issues including integration of care for dual eligibles, private financing of long-term care through reverse mortgages and private insurance, nursing home quality, delivery and financing of prescription drugs to nursing home residents, and reforms to Medicare post-acute care payment systems.

Prior to Avalere, Anne led Medicaid and long-term care policy for the federal Office of Management and Budget (OMB) during the development of President Clinton's long-term care initiative. Before joining OMB, Anne conducted health services research as a Senior Research Associate for LifePlans, Inc., a long-term care risk management and consulting firm. She also worked as a legislative assistant responsible for health and long-term care policy in the office of Representative John Lewis (D-GA). Anne holds a Bachelor's degree in Psychology from Furman University in Greenville, SC, and a Master's Degree from the Heller School at Brandeis University.

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Mark Warshawsky

Mark J. Warshawsky, Ph.D. is Director of Retirement Research at Watson Wyatt Worldwide. Dr. Warshawsky is a recognized thought leader on pensions, social security, insurance and health care financing. Prior to joining Watson Wyatt he was Assistant Secretary for Economic Policy at the Treasury Department, Director of Research at TIAA-CREF and senior economist at the IRS and Federal Reserve Board.

Dr. Warshawsky is a member of the Social Security Advisory Board for a term through 2012, he is also on the Advisory Board of the Pension Research Council of the Wharton School. Dr. Warshawsky has written numerous articles, books and working papers as well as testifying before Congress on pensions, annuities and other economic issues.

Gail Wilinsky

Gail Wilinsky is John M. Olin Senior Fellow at Project HOPE, where she analyzes and develops policies relating to health care reform and changes in the medical marketplace. She testifies frequently before Congressional committees, advises members of Congress and other elected officials, and speaks nationally and internationally before professional, business and consumer groups. She co-chairs a Presidential Task Force on improving the health care of veterans and military retirees. From 1997 to 2001, she chaired the Medicare Payment Advisory Commission. From 1995 to 1997, she chaired the Physician Payment Review Commission. Previously, she served as Deputy Assistant to President George Bush for Policy Development, advising him on health and welfare issues. Prior to that, she was Administrator of the Health Care Financing Administration, overseeing the Medicare and Medicaid programs. Ms. Wilinsky is a member of the Institute of Medicine and its Governing Council. She is an advisor to the Robert Wood Johnson Foundation and the Commonwealth Fund and is a director on several corporate boards. She serves on the Academy's Restructuring Medicare for the Long Term Steering Committee. A member of the National Academy of Social Insurance since 1993, Ms. Wilinsky received her Ph.D. in economics from the University of Michigan