



LTQA Symposium

Integrated Care for Individuals with Dual Eligibility

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UPMC HEALTH PLAN

Speaker Biographies

Hany Abdelaal

VNSNY CHOICE

Dr. Hany Abdelaal serves as President of VNSNY CHOICE Health Plans, the health plans affiliated with the Visiting Nurse Service of New York (VNSNY). VNSNY is one of the oldest and largest nonprofit home and community-based health care organizations in the United States, providing acute, rehabilitative, end-of-life, mental health, long-term care services and managed care plans to residents of the five boroughs of New York City, Nassau, Suffolk and Westchester Counties, as well as parts of upstate New York. Dr. Abdelaal joined the plan in March of 2012 as its Chief Medical Officer and was named President in January 2015. Currently, VNSNY CHOICE Health Plan has the largest not for profit MLTSS plan in NYS, MMP (FIDA), FIDE SNP, and an HIV Medicaid Special Needs Plan. Dr. Abdelaal has been involved in the duals programs and MLTSS programs for over 20 years. Previously, Dr. Abdelaal served in executive positions as Chief Medical Officer at Elderplan, Executive Director at Homefirst (NYC MLTC HealthPlan), and Associate Medical Director at Maimonides Medical Center. He completed his internship and residency in Primary Care/internal Medicine at Maimonides Medical Center. Dr. Abdelaal received his D.O. from the New York College of Osteopathic Medicine.

Gretchen Alkema

The SCAN Foundation

Gretchen E. Alkema is Vice President of Policy and Communications at The SCAN Foundation. In this role, Gretchen oversees the Foundation's communications and policy strategy development and execution, championing a world where all people – regardless of age, life circumstance, or ability – live well in the place they call home. Prior, Gretchen served in the office of Senator Blanche Lincoln (D-AR) as a Heinz/Health and Aging Policy Fellow where she advised on aging, health, mental health, and long-term care policy. She also worked in a variety of community-based care settings in both the public and private sectors.

Gretchen holds a PhD from the University of Southern California (Gerontology) and completed post-doctoral training at the VA Greater Los Angeles. She earned a master's degree in Social Work from the University of Michigan, and bachelor's degree from the University of Colorado. Gretchen enjoys hiking, 19th century Russian novels, and a great cup of coffee.

G. Lawrence Atkins

Long-Term Quality Alliance

Dr. Atkins is Research Director of the Long-Term Quality Alliance in Washington, DC. He is a Board member and immediate past-President of the National Academy of Social Insurance. He was recently the Staff Director of the federal Commission on Long-Term Care, which issued its final report in September 2013. Prior to that, he was Executive Director, U.S. Public Policy at the global pharmaceutical manufacturer Merck.

Dr. Atkins is a veteran of more than 30 years of health and social policy analysis, policy development, and legislative representation at the local, state, and federal levels. He directed Public Policy at Schering-Plough Corporation; was founder and President of Health Policy Analysts, Inc., a firm providing consultation on pharmaceutical, health benefits, and health care reimbursement issues; was Executive Director of the Corporate Health Care Coalition, an alliance of Fortune 100 companies on federal and state health reform issues; and headed a health and benefits policy practice in the Washington office of the New York law firm Winthrop, Stimson, Putnam and Roberts. During the 1990s, Dr. Atkins served on two quadrennial Social Security Advisory Commissions – 1991 as a Commission member and 1995 as a member of the Technical Panel.

During the 1980s, Dr. Atkins served on the U.S. Senate Special Committee on Aging as professional staff, Deputy Staff Director and Republican Staff Director for Chairman John Heinz (R-PA), and advised Senator Heinz as a member of the Senate Finance Committee on retirement income and health policy matters, and as a member of the 1983 National Commission on Social Security Reform. Prior to his work in the Congress, Dr. Atkins developed health and human services policy at the state and local government levels.

Dr. Atkins holds a Ph.D. from the Heller School for Social Policy and Management at Brandeis University, where he is currently a member of the Board of Overseers. He holds master's degrees from the University of Louisville and the University of Kentucky, and an undergraduate degree from Kenyon College.

Shawn Bloom

National PACE Association

Shawn Bloom is the President and CEO of the National PACE Association (NPA). Shawn has been with NPA since 2000 at which time there were 18 PACE organizations operating in 6 states.

Prior to NPA, Shawn spent 5 years as the Executive Director of the Missouri Association of Homes for the Aging (MoAHA), which represented over 100 not-for-profit long-term health care and housing facilities in the state of Missouri. Shawn previously worked in the Policy and

Governmental Affairs Division of the American Association of Homes and Services for the Aging (AAHSA) – now called Leading Age – a Washington, D.C. based trade association that represents not-for-profit long-term health and housing services for the aging.

Shawn has testified before the U.S. Congress, several state legislative committees as well as the National Academy of Sciences on elderly and long-term care policy issues.

Shawn received his B.S. in biochemistry and gerontology from Kansas State University and completed his Master's coursework in long term care at the University of North Texas, Center for Studies in Aging. Shawn began his career in the field working as a nursing home Certified Nurse Aide in high school and college.

Ann Mary Ferrie

VNSNY CHOICE

Ann Mary Ferrie serves as the Associate Director of Government Affairs & Public Policy at the Visiting Nurse Service of New York (VNSNY), the largest and one of the oldest nonprofit home and community-based health care organizations in the country. Ms. Ferrie helps lead VNSNY's efforts to impact policy at the New York City, State, and Federal levels, notably those related to integrating care for individuals dually enrolled in Medicare and Medicaid. She advises VNSNY corporate and business line leadership on public policy that impacts VNSNY strategy and operations, supporting all VNSNY services including home health, hospice, various community programs and VNSNY's managed care affiliate CHOICE Health Plans. Previously, Ms. Ferrie served as a program officer at the Center for Health Care Strategies (CHCS) where she focused on initiatives related to integrated care for dually eligible individuals. She received her MPH from Columbia University's Mailman School of Public Health.

Wendy Fox-Grage

National Academy of State Health Policy

Wendy Fox-Grage joined NASHP in September 2019 as a project director with the Chronic and Vulnerable Populations Team, working on long-term services and supports, family caregiving, and palliative care. Previously, she worked as a senior strategic policy advisor for the AARP Public Policy Institute for 15 years and as a program principal for the National Conference of State Legislatures for nearly 10 years. She started her career as a Congressional Fellow for the US Senate Special Committee on Aging. She has a BS in human development and social policy from Northwestern University and Master's degrees in both gerontology and public administration from the University of Southern California.

Larry Gottlieb

Commonwealth Care Alliance

Larry Gottlieb, MD, MPP is CCA's Chief Quality Officer and Chief Executive Officer of the Center to Advance Consumer Partnership. Larry is an accomplished physician executive with thirty years of diverse experience and achievement in managed care, population health, quality

improvement, clinical information technology, and healthcare delivery. He is widely recognized in the healthcare industry as a leader in quality measurement and improvement for populations with complex health and social needs.

Before joining CCA, Larry was Vice President and Senior Medical Director at Health Dialog, a Boston-based wellness and chronic care support organization. Before Health Dialog, Larry was Senior Vice President and Chief Medical Officer of two early stage care management information technology companies, and served as a Medical Director at Harvard Community Health Plan and Harvard Pilgrim Health Care.

Larry obtained an undergraduate degree in engineering and a medical degree from Tufts University and a Master of Public Policy degree from Harvard's Kennedy School of Government. He completed a residency in internal medicine at Tufts New England Medical Center and was a Robert Wood Johnson Clinical Scholar at Stanford.

Katherine Hayes

Bipartisan Policy Center

Katherine Hayes is the director of health policy at the Bipartisan Policy Center. Prior to joining BPC, Hayes held the position of associate research professor in the department of health policy at the George Washington University (GW) School of Public Health and Health Services. Her primary areas of research included public and private health insurance coverage, reimbursement and financing, and the integration of Medicare and Medicaid services. She taught graduate-level courses in federal advocacy, policymaking, and the federal budget process.

Prior to joining GW, Hayes served as vice president of health policy for Jennings Policy Strategies, Inc. Other private-sector experience includes legal practice as a member of the health and legislative practice groups at Hogan & Hartson, LLP (now Hogan Lovells), policy director for two large Catholic health systems, and policy director for Cardinal Glennon Children's Hospital.

Her government experience includes serving as health policy advisor to members of the Senate and the House of Representatives in both political parties. Hayes served as a program consultant for the State of Missouri Medicaid agency, and as health and education policy advisor for the State of Texas, Office of State-Federal Relations. She received a Bachelor of Arts degree in international studies from the University of North Carolina at Chapel Hill and a Juris Doctor from the American University Washington College of Law.

Michelle Herman Soper

Center for Health Care Strategies

Michelle Herman Soper, MHS, is vice president of integrated care at the Center for Health Care Strategies (CHCS). In this role, she oversees a portfolio of CHCS' work to improve care delivery and financing for individuals who are dually eligible for Medicare and Medicaid, those in need of long-term services and supports, and those with complex needs.

Prior to CHCS, Ms. Soper served as special assistant to the executive director and the acting director of communications for the Medicaid and CHIP Payment and Access Commission (MACPAC). Previously, she served as special projects coordinator for the Office of Chronic and Long-Term Care within the District of Columbia's Department of Health Care Finance, where she led projects to improve the delivery of long-term care and care for chronic conditions. She also held posts at Avalere Health and the National Conference of State Legislatures. Ms. Soper has a master's degree in health science from The Johns Hopkins School of Hygiene and Public Health, and a bachelor's degree in psychology from Tufts University.

Rhys Jones

America's Health Insurance Plans (AHIP)

Rhys Jones is Vice President, Medicaid Advocacy for America's Health Insurance Plans (AHIP), an industry association representing health plans that provide health coverage to more than 200 million Americans. Rhys leads the organization's activities in support of Medicaid and the role of Medicaid health plans in serving Medicaid enrollees.

He is known for his operations and policy expertise in Medicaid managed care, managed LTSS/HCBS, Medicare Advantage and Part D prescription drug programs, dual eligible special needs plans (SNPs), Medicare-Medicaid financial alignment demonstrations, Medicare-Medicaid program integration and managed care.

Prior to joining AHIP, Rhys served as Director, Medicaid Business Development in Anthem's Government Business Division from 2014 to 2016, advising state Medicaid agencies and policy makers on Medicaid program design and the value proposition for managed Medicaid and long-term services and supports (LTSS). From 2005 to 2014, he was Vice President, Medicare Policy and Market Development in Anthem/Amerigroup's Specialty Products Group. Before joining Amerigroup, Rhys was a consultant advising health plans on Medicare program issues, regulatory compliance, HIPAA privacy and health plan operations, including a five-year tenure in the Healthcare Consulting Practice of Pricewaterhouse Coopers.

Rhys has presented extensively on managed care, Medicare, Medicaid, and dual eligible issues at industry conferences. He is a past member of the SNP Alliance Medicare-Medicaid Integration Leadership group, and served on the board of Senior Services of Southeastern Virginia, Virginia's largest Area Agency on Aging. He has held positions in health plan operations and regulatory affairs with a number of regional and national health plans, including Health Net and Foundation Health Systems. He holds a Master of Public Health degree in Health Policy and Administration from the University of California, Berkeley and is the author of two books on managed care: *HMO 101: Introduction to HMOs* and *The Ultimate HMO Handbook*.

Mary Kaschak

Long-Term Quality Alliance, National MLTSS Health Plan Association

Ms. Kaschak is Executive Director of the Long-Term Quality Alliance and National MLTSS Health Plan Association in Washington, DC. She comes to the Alliance and the Association with

ten years of experience in aging and health policy, most recently as Deputy Director of the Aging and Disability Business Institute at the National Association of Area Agencies on Aging (n4a). At the Business Institute, Ms. Kaschak played a lead role in advancing the readiness and business acumen of community-based organizations (CBOs) to successfully engage in the design and delivery of integrated care systems for older adults and younger adults with disabilities. Ms. Kaschak's responsibilities at the Business Institute included business development, grant management, and oversight of day-to-day operations.

Prior to her time with the Business Institute, Ms. Kaschak worked with n4a in several other capacities. She served as n4a's Senior Program Manager of Capacity Building and Integrated Care, Program Manager of CBO Capacity Development, and Program Coordinator of Medicare and Benefits Outreach. Ms. Kaschak studied Gerontology at Miami University.

Cheryl Phillips

Special Needs Plans (SNP) Alliance

Cheryl Phillips, M.D., is the President and CEO of the Special Needs Plan Alliance, a national leadership association for special needs and Medicare-Medicaid plans serving vulnerable adults. Prior to this she was the Senior VP for Public Policy and Health Services at LeadingAge. She has also served as the Chief Medical Officer of On Lok Lifeways, the originator of the PACE (Program of All-Inclusive care for the Elderly) model based in San Francisco, CA, and the Medical Director for Senior Services and Chronic Disease Management, for the Sutter Health System in Northern California. As a fellowship-trained geriatrician her clinical practice focused on nursing homes and the long-term care continuum. Dr. Phillips is a past president of the American Geriatrics Society, and is also a past president of the American Medical Directors Association, the society for post-acute and long term care medicine. She continues to serve on multiple technical advisory groups for chronic care, LTC quality, home and community-based services, and person-centered measures, and has provided multiple testimonies to the U.S. Congress. She is a frequent speaker for aging service providers, health plan leaders, and state and national meetings. She served as a primary care health policy fellow under Secretary Tommy Thompson, and was appointed by the Governor as a California Commissioner on Aging and appointed to the Olmstead Advisory Committee for California. Dr. Phillips is on the Board of Directors of the SCAN Foundation.

Carol Raphael

Manatt Health

Carol Raphael is a Senior Advisor at Manatt Health Solutions. She served as President and Chief Executive Officer of the Visiting Nurse Service of New York (VNSNY), the largest nonprofit home health agency in the United States from 1989 to 2011. Ms. Raphael expanded the organization's services and launched health plans and innovative models of care for complex populations with chronic illness and functional impairments. She was Board Chair of AARP, which serves 38 million members until June 2016 when her six-year term concluded. Prior to joining VNSNY, Ms. Raphael held executive positions at Mt. Sinai Medical Center and in New York City government. She served on a number of commissions including the Medicare

Payment Advisory Commission (MedPAC), the Federal Bipartisan Commission on Long Term Care, the New York State Medicaid Redesign Team, the New York State Hospital Review and Planning Council and several Institute of Medicine Committees and was an Advanced Leadership Fellow at Harvard University.

She has been a member of the National Quality Forum Measures Application Partnership (MAP) where she chaired its Post-Acute and Long-Term Care Committee working with CMS to recommend quality measures as federal programs move to value based purchasing and is currently co-chair its Attribution Committee and a member of its All-Cause Admissions and Readmissions Standing Committee. Additionally, she was Chair of the New York eHealth Collaborative until 2015 and remains a member of the Board as it seeks to implement a statewide, standardized platform for the exchange of health information. She is on the Boards of the Primary Care Development Corporation, the Medicare Rights Center, the Commonwealth Care Alliance, The Scan Foundation, the RAND Health Advisory Board and Henry Schein, Inc. She co-edited the book “Home Based Care for a New Century” and was a Visiting Fellow at the Kings Fund in the United Kingdom.

Carol Regan

Community Catalyst

With over 30 years of experience with national and state-based public policy and advocacy organizations, Carol’s work has included policy research, analysis and legislative advocacy primarily on health insurance coverage, programs and services for low-income children and families, long-term care, and workforce development.

Before joining Community Catalyst, Carol was the Director of Government Affairs for PHI (Paraprofessional Healthcare Institute) leading its federal policy work to improve the quality of care in the eldercare/disability services sector by improving the quality of jobs. Before opening PHI’s Washington, DC office, she was the Director of PHI’s Health Care for Health Care Workers campaign, advocating affordable health coverage for direct care workers. She has held policy positions at the Service Employees International Union, the United Food and Commercial Workers Union, the American Federation of State, County and Municipal Employees Union and the Children’s Defense Fund. Carol was the Interim Executive Director of the Herndon Alliance, and is an Adjunct Professor at the National Labor College in Silver Spring, Maryland, and a member of the National Academy of Social Insurance. Regan received her Master’s in Public Health from the University of Michigan.

Leena Sharma

Community Catalyst

As a Project Manager/Senior Policy Analyst, Leena Sharma provides policy expertise by translating knowledge and policies to support advocacy that promotes consumer and community engagement in health system transformation. Leena also serves as the lead for the Center’s efforts to improve care for Medicare-Medicaid beneficiaries (dual eligibles) and is responsible for integrating lessons from this work into the broader work of the Center. Prior to this role, Leena served as the Senior State Advocacy Manager on the Voices for Better Health

project, which brought a consumer voice to the design and implementation of new programs aimed at providing better coordinated, comprehensive, high-quality care to Medicare-Medicaid beneficiaries (“dual eligibles”).

Prior to working at Community Catalyst, Leena worked at the Greater New Jersey Chapter of the Alzheimer's Association, where she served as the Public Policy, Advocacy & Volunteer Coordinator. There she worked on advancing the public policy advocacy efforts on behalf of those who struggle with Alzheimer's disease and their family caregivers.

Leena holds a B.A. in Political Science from Rutgers University and a M.A. in Public Policy from Monmouth University.

Lois Simon

Seniorlink

Lois Simon, M.P.H., is the EXECUTIVE VICE PRESIDENT of POLICY AND PROGRAMS at SENIORLINK, a national caregiving company providing care collaboration solutions that leverage human touch and technology designed to truly integrate and activate consumers, caregivers, payers and providers to deliver person and family centered care resulting in better outcomes at lower costs. In this executive leadership role, Lois is responsible for federal and state government relations, new program development and cross-functional executive teamwork associated with business strategy and development.

Prior to joining Seniorlink, Lois was the CO-FOUNDER and PRESIDENT of COMMONWEALTH CARE ALLIANCE, a nationally recognized pioneer in the design and operation of managed care programs integrating Medicare and Medicaid financing (through FIDESNP and MMP frameworks) and service delivery for populations with complex needs: elders and individuals with disabilities across the age spectrum. In her fourteen years with CCA, Lois led the organization to achieve excellence and national recognition for desired care, cost and consumer satisfaction outcomes by designing innovative approaches to the integration of Long Term Services and Supports (LTSS) with behavioral health and medical care.

Lois has over three decades of leadership experience serving complex and high cost government supported populations in clinical program development, government service and executive management roles. Lois served in a variety of government positions, most notably as the Director of Long-Term Care for the Massachusetts Medicaid program and as the Assistant Secretary of the State Unit on Aging. She went on to serve as Senior Vice President and Regional General Manager for The Mentor Network, a national leader in health and human services providing home and community-based care to individuals with disabilities. Lois served as Chief Operating Officer at the East Boston Neighborhood Health Center where, among her responsibilities, she oversaw the management of the home care program and the Program for All-inclusive Care for the Elderly (PACE). She also served on the executive leadership team as the Vice President for Care Delivery at Neighborhood Health Plan, a large Medicaid Managed Care Organization in Massachusetts, overseeing care management and care delivery services.

Lois received her Master's degree in Public Health with a concentration in Health Systems from the Boston University School of Public Health, from whom she received a Distinguished Alumni Award in 2015. She serves on several boards both locally and nationally and through her role as

Founder and Principal of L. Simon Solutions LLC, has provided strategic and operational consultancy services to a diverse array of organizations across the country focused on fostering the integration of long-term services and supports with medical and behavioral health care - across policy, financing and care delivery dimensions.

Damon Terzaghi

ADvancing States

Damon Terzaghi has spent his career in the public healthcare field, focusing on improving programs that serve low-income adults, children, seniors, and people with disabilities. He has experience in a wide range of entities, including government agencies, nonprofit organizations, and for-profit companies. He has served in both federal and state government, working for the Oregon Department of Human Services and the Centers for Medicare and Medicaid Services. He also led the Medicaid research unit of Marwood Group, LLC, was a Senior Policy Associate with the Medicaid Directors' association, and is currently Senior Director of LTSS at ADvancing States.

John Tschida

Association of University Centers on Disability (AUCD)

John Tschida, MPP, is the associate executive director of research and policy for the Association of University Center on Disabilities (AUCD). AUCD is a national network of more than 100 university-based interdisciplinary programs advancing policy, research, education, practice, leadership and advocacy to improve the quality of life of children and adults with disabilities in the U.S. and around the world.

Mr. Tschida has spent the last 20 years using data and research to drive policy change and service development for individuals for disabilities. Before joining AUCD, he served as director of the National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) at the U.S. Department of Health & Human Services. NIDILRR is the federal government's premier applied research agency impacting individuals with disabilities.

Prior to joining NIDILRR in 2014, he served as director of public policy and innovation at Allina Health in Minnesota, where he developed integrated health delivery systems and financing models for people with disabilities. At the Courage Center, Minnesota's leading nonprofit provider of rehabilitation services, Mr. Tschida was vice president of public affairs and research. There, he built and directed a policy and research team that focused on defining and achieving better outcomes for complex populations. His team received one of the first Health Care Innovation Awards from the Center for Medicare & Medicaid Innovation, Centers for Medicare & Medicaid Services.

Earlier in his career, Tschida served as a research fellow at the National Rehabilitation Hospital Center for Health and Disability Research, in Washington, D.C. He was also assistant director of the Minnesota House of Representatives Public Information Office.

Mr. Tschida has served on a number of public and private boards designing policy or governance solutions to further the independence of people with disabilities and he has written numerous articles on disability and public policy for national and local publications.

Mr. Tschida, who has lived with a spinal cord injury since 1993, has a master's degree in public policy and a health services research certificate from Georgetown University, and a Bachelor of Arts from Macalester College.

Shaunta Vaughn

Kaiser Permanente

Shaunta Vaughn has accumulated 20 years of corporate experience as a cultural and operational change-agent. Her leadership approach emphasizes talent management and leadership development; operational process improvement through better technology utilization; and, optimization of the consumer experience. Currently, Shaunta functions as a leader in two different capacities for Kaiser Foundation Health Plan of the Mid-Atlantic States: the first, as the Executive Director of Revenue Cycle with responsibility for more than \$190 million in patient service revenue across Maryland, the District of Columbia and Northern Virginia; and, the second as the interim Senior Director for regional Outside Services Utilization as part of the Continuum of Care. As the Revenue Cycle leader for the Mid-Atlantic region, Shaunta oversees the health plan's risk adjustment program, coding, financial counseling, patient financial services, and collections vendor management functions. Within the patient Care Continuum, she is responsible for the daily operations of referrals management for outpatient services. Additionally, she is tasked with the organizational transformation of the additional administrative functions critical to efficient and effective patient care transitions, including Emergency Care Management, Repatriation, and Utilization Management Compliance.

Prior to joining the Mid-Atlantic region, Shaunta started her Kaiser Permanente tenure in the Georgia region as the Senior Director for Revenue Cycle. Prior to joining the Kaiser Permanente family, Shaunta spent much of her career as a consultant for hospital-based health systems, overseeing multiple concurrent client engagements across the country focused on accelerated cash collections benefitting the respective organizations.

Shaunta serves as a member of the Board of Directors for Boys & Girls Clubs of Greater Washington, as well as the Montgomery County Historical Association. Shaunta also founded STRIDE, a forum for women in leadership dedicated to actively advocating, educating and promoting other women into new and progressive leadership capacities.

Shaunta holds a Bachelor of Science in Biology from Vanderbilt University and a Master of Business Administration. She is a certified Corporate Coach and a licensed Zumba instructor.