

**TAB 4:**

**AGENDA**

# CONFERENCE AT A GLANCE

Wednesday, November 20

4:15 Conference Registration	DUCKBLIND LOUNGE
5:30-7:00 Opening Reception	DUCKBLIND LOUNGE AND BAYVIEW RESTAURANT
7:00-9:30 Dinner/Welcome	KEYNOTE SPEAKER: John Hockenberry, NBC News Robyn Stone                      Jack Ebeler                      Theresa Varner <b>PROSPECT BAY A-C</b>

Thursday, November 21

7:30-8:30 Breakfast Buffet	BAYVIEW RESTAURANT
8:30-10:15 Plenary	<i>“Can Managed Care Serve People with Disabilities? The Policy Debate...The Need for Research”</i> Trish Riley                      Robyn Stone Sandra Harmon-Weiss                      Michael Bailit                      Allan Bergman <b>PROSPECT BAY A-C</b>

**10:15-10:30**                      **Break**

10:30-12:30 First Breakout Sessions	Impact of Managed Care on Children with Disabilities <b>PROSPECT BAY A-B</b>	Managing Acute Care <b>WATER’S EDGE</b>	Consumer Satisfaction <b>SHAW BAY A</b>	System Design Issues <b>SHAW BAY B-C</b>
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**12:30-12:45**                      **Break**

12:45-2:00 Luncheon Plenary	<i>“Funders Roundtable”</i> Robyn Stone                      James Knickman                      Diane Rowland                      Stephen Somers Donna Regenstreif                      Mary Harahan                      Nancy Miller                      Betty Jo Berland <b>PROSPECT BAY A-C</b>			
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**2:00-2:15**                      **Break**

2:15-4:15 Second Breakout Sessions	Impact of Managed Care on Adults with Mental Illness <b>PROSPECT BAY A-B</b>	Managing Long-Term Care <b>WATER’S EDGE</b>	Quality Measures in Managed Care Settings <b>SHAW BAY A</b>	Plan Models <b>SHAW BAY B-C</b>
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**4:15-7:00**                      **Break**

7:00-9:00 Dinner Presentation	<i>“The Dark Side of the Loon”</i> Paul Spitzer, Cooperative Oxford Laboratory <b>PROSPECT BAY A-C</b>			
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Friday, November 22

7:30-8:30 Breakfast and Checkout	BAYVIEW RESTAURANT			
8:30-10:30 Third Breakouts Sessions	Impact of Managed Care on Adults with AIDS or Physical Disabilities <b>PROSPECT BAY A-B</b>	Integrating Acute and Long-Term Care <b>WATER’S EDGE</b>	Quality Outcomes <b>SHAW BAY A</b>	Risk Adjustment/ Rate-Setting <b>SHAW BAY B-C</b>

**10:30-10:45**                      **Break**

10:45-12:15 Plenary	<i>“What Do We Know? Where Do We Go From Here?”</i> Trish Riley                      Sandra Tanenbaum Judith Feder                      Shoshanna Sofaer                      Robert Hurley <b>PROSPECT BAY A-C</b>			
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**12:15-12:30**                      **Break**

12:30-2:00 Luncheon Address	<i>“Opportunities and Challenges for the Disabled in Managed Care”</i> Bruce Vladeck, DHHS/HCFA <b>PROSPECT BAY A-C</b>			
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## **DINNER AND KEYNOTE ADDRESS**

**Wednesday, November 20 ✧ 7:00-9:30 pm ✧ Prospect Bay A-C**

**Speakers:**

**Jack Ebeler**

Acting Assistant Secretary for Planning and Evaluation  
Department of Health and Human Services

**Mary Harahan**

Department of Health and Human Services  
Office of Disability, Aging and Long-Term Care Policy

**Theresa Varner**

Director, Public Policy Institute  
American Association of Retired Persons

**Robyn Stone**

Acting Assistant Secretary for Aging  
Department of Health and Human Services

**Keynote Address:**

**John Hockenberry**

Correspondent  
NBC News

## PLENARY

Can Managed Care Serve People with Disabilities? The Policy Debate...The Need for Research

Thursday, November 21 ✧ 8:00-10:15 am ✧ Prospect Bay A-C

**Moderator:** **Trish Riley**  
National Academy for State Health Policy

**Expert Panel:** **Michael Bailit**  
Massachusetts Division of Medical Assistance

**Allan Bergman**  
United Cerebral Palsy Associations

**Sandra Harmon-Weiss**  
U.S. Healthcare

**Robyn Stone**  
Administration on Aging

## **FIRST BREAKOUT SESSION**

**TRACK I: Impact of Managed Care on Children with Disabilities**

**Thursday, November 21 ✧ 10:30 am-12:30 pm ✧ Prospect Bay A-B**

**Moderator:**

**Brian Burwell**  
The MEDSTAT Group

**Sandra Tanenbaum**  
Ohio State University College of Medicine

**Speakers:**

**Carol Irvin**  
Abt Associate, Inc.  
*"Evaluation of the District of Columbia's Demonstration Program: Managed Care System for Disabled and Special Needs Children"*

**Elizabeth Shenkman**  
University of Florida, College of Medicine  
*"Families' Out-of-Pocket Expenses When Caring for Children With Special Needs: A Preliminary Report Comparing Children in Medicare and a Commercial Product Line"*

**Deborah Allen**  
Massachusetts Department of Public Health  
*"The Managed Care Enhancement Program for Children with Special Health Care Needs"*

**Barbara Staub**  
White Bear Lake Clinic  
*"Services for Children with Chronic Illness and Disease in an HMO"*

**Harriette Fox and Margaret McManus**  
Maternal and Child Health Policy Research Center  
*"State Medicaid Managed Care Policies Affecting Children"*

**Reactors:**

**Ruth Stein**  
Albert Einstein College of Medicine

**Nancy Thaler**  
Pennsylvania Department of Public Welfare  
Office of Mental Retardation

# FIRST BREAKOUT SESSION

## TRACK II: Managing Acute Care

Thursday, November 21 ✧ 10:30 am-12:30 pm ✧ Water's Edge

### Moderators:

**Judith Feder**

Georgetown University  
Institute of Health Care Research and Policy

**Robert Friedland**

National Academy on Aging

### Speakers:

**Chad Boulton**

University of Minnesota  
*"Identifying High-Risk Medicare HMO Members"*

**Gerald Riley**

Health Care Financing Administration  
Office of Research and Demonstrations  
*"Health Status of Medicare HMO Enrollees in 1994"*

**Andrew Kramer**

University of Colorado  
Health Sciences Center  
*"Outcomes for Stroke and Hip Fracture Patients in HMO and Fee-or-Service Systems: Study Summary"*

**Bettina Experton**

Humetrix, Inc.  
*"Impact of Payor/Provider Type on the Health Care Utilization, Cost and Outcome of the Frail Elderly"*

**Robert Schlenker**

University of Colorado  
Center for Health Services Research  
*"Medicare Managed Home Care"*

### Reactors:

**Randall Brown**

Mathematica Policy Research

**Peter Fox**

PDF Incorporated

**Sandra Harmon-Weiss**

U.S. Healthcare

## **FIRST BREAKOUT SESSION**

### **TRACK III: Consumer Satisfaction**

**Thursday, November 21** ✧ **10:30 am-12:30 pm** ✧ **Shaw Bay A**

**Moderator:**                   **Shoshanna Sofaer**  
George Washington University Medical Center  
Center for Health Outcomes Improvement Research

**Speakers:**                   **Karen Donelan**  
Harvard University, School of Public Health  
*"Patient Assessment of Care in Managed Care and Fee-For-Service Health Plans"*

**Robert Newcomer**  
University of California, San Francisco  
*"Health Care Satisfaction and Risk of Disenrollment"*

**Marsha Gold**  
Mathematica Policy Research, Inc.  
*"Access to Care in Medicare Managed Care: Results from a 1996 Survey of Enrollees and Disenrollees"*

**Susan Edgman-Levitan**  
Harvard University  
Picker Institute  
*"CAHPS: Chronic Illness and Disabilities"*

**Reactors:**                   **Carol Cronin**  
*Health Pages*

**Joyce Dubow**  
American Association of Retired Persons

**Katherine Seelman**  
Department of Education  
National Institute on Disability and Rehabilitation Research

# FIRST BREAKOUT SESSION

## TRACK IV: System Design Issues

Thursday, November 21 ✧ 10:30 am-12:30 pm ✧ Shaw Bay B-C

**Moderator:**                   **Robert Hurley**  
Virginia Commonwealth University  
Medical Center

**Speakers:**                   **Thomas McGuire**  
Boston University  
*"Risk-Sharing for Managed Mental Health/Substance Abuse Care"*

**Sara Bachman**  
The MEDSTAT Group  
*"Purchasing Medicaid Benefits Through Carve-Out Arrangements: Factors Influencing State Decision-Making"*

**Margo Rosenbach**  
Health Economics Research  
*"How the Oregon Health Plan Serves People With Disabilities: System Design Issues and First-Year Impacts"*

**Craig Thornton and Judith Wooldridge**  
Mathematica Policy Research, Inc.  
*"Plan Choice by Blind and Disabled SSI Beneficiaries and Risk Selection: First and Second Year Experience to TennCare"*

**Reactors:**                   **Christine Gianopoulos**  
Maine Bureau of Elder and Adult Services

**Dann Milne**  
Colorado Department of Health Care Policy and Financing

**Sharman Stephens**  
Health Care Financing Administration

# PLENARY

## Funders Roundtable

Thursday, November 21 ✧ 12:45-2:00 pm ✧ Prospect Bay A-C

**Moderator:** **Robyn Stone**  
Acting Assistant Secretary for Aging  
Department of Health and Human Services

**Expert Panel:** **Betty Jo Berland**  
Department of Education  
National Institute for Disability Rehabilitative Research

**Mary Harahan**  
Department of Health and Human Services  
Office of Disability, Aging and Long-Term Care Policy

**James Knickman**  
Robert Wood Johnson Foundation

**Nancy Miller**  
Health Care Financing Administration  
Division of Disability and Aging

**Donna Regenstreif**  
John A. Hartford Foundation

**Diane Rowland**  
Kaiser Commission on the Future of Medicaid

**Stephen Somers**  
Center for Health Care Strategies

## SECOND BREAKOUT SESSION

TRACK I: Impact of Managed Care on Adults with Mental Illness

Thursday, November 21 ✧ 2:15-4:15 pm ✧ Prospect Bay A-B

**Moderator:**

**Brian Burwell**  
The MEDSTAT Group

**Sandra Tanenbaum**  
Ohio State University College of Medicine

**Speakers:**

**Bentson McFarland**  
Oregon Health Sciences University  
*"Severely Mentally Ill HMO Members"*

**Joan Bloom**  
University of California, Berkeley  
*"Colorado's Early and Preliminary Experience with Capitation for the Severely and Persistently Mentally Ill Adults"*

**Thomas McGuire**  
Boston University  
*"The Effects of Private Sector Mental Health Carve-Outs"*

**Barbara Dickey**  
McLean Hospital  
*"The Massachusetts Mental Health System Change"*

**Reactors:**

**Howard Goldman**  
University of Maryland

**Michael Hogan**  
Ohio Department of Mental Health

## SECOND BREAKOUT SESSION

### TRACK II: Managing Long-Term Care

Thursday, November 21 ✧ 2:15-4:15 pm ✧ Water's Edge

**Moderators:**

**Judith Feder**

Georgetown University  
Institute of Health Care Research and Policy

**Robert Friedland**

National Academy on Aging

**Speakers:**

**Nelda McCall**

Laguna Research Associates  
*"Arizona Long-Term Care System (ALTCS)--Part of the Arizona Health Care Cost Containment System (AHCCCS)"*

**Robert Schmitz**

Abt Associates, Inc.  
*"The Effects of Partial Capitation: CNO Demonstration"*

**Patrick Fox**

University of California, San Francisco  
*"Case Management and Special Populations: Lessons from the Medicare Alzheimer's Disease Demonstration"*

**C. Jean Blaser**

Illinois Department on Aging  
*"A Coordination Model of Managed Care"*

**Reactors:**

**Richard Browdie**

Pennsylvania Department of Aging

**Nancy Miller**

Health Care Financing Administration  
Division of Aging and Disability

**Janet O'Keeffe**

American Association of Retired Persons

## SECOND BREAKOUT SESSION

### TRACK III: Quality Measures in Managed Care Settings

Thursday, November 21 ✧ 2:15-4:15 pm ✧ Shaw Bay A

**Moderator:**

**Shoshanna Sofaer**

George Washington University Medical Center  
Center for Health Outcomes Improvement Research

**Speakers:**

**R. Heather Palmer**

Harvard University School of Public Health  
*"Measuring Performance on Managed Care Organizations for Persons with Disabilities"*

**James Perrin**

Harvard Medical School  
*"Children with Disabilities and Managed Care: Monitoring Quality of Care"*

**Margaret Stineman**

University of Pennsylvania Medical Center  
*"Functional Independence Measure (FIM)-Function Related Groups (FRG) Outcome Pattern Analysis"*

**Robert Kane**

University of Minnesota School of Public Health  
*"Assessing the Quality of PACE Care"*

**Reactors:**

**George Isham**

HealthPartners

**Margaret O'Kane**

National Committee on Quality Assurance

**K. Charlie Lakin**

University of Minnesota

## SECOND BREAKOUT SESSION

### TRACK IV: Plan Models

Thursday, November 21 ✧ 2:15-4:15 pm ✧ Shaw Bay B-C

**Moderator:** **Robert Hurley**  
Virginia Commonwealth University  
Medical Center

**Speakers:** **H. Stephen Leff**  
Human Services Research Institute  
*"The Evaluation of Wisconsin's Special Care Initiative: The ICare Program"*

**Robert Master**  
Community Medical Alliance  
*"Community Medical Alliance Program Overview"*

**Edward Wagner**  
Group Health Cooperative of Puget Sound  
*"The Chronic Care Clinic: A Randomized Controlled Trial Testing an Approach for Delivering Planned Primary Care to Patients with Chronic Health Problems"*

**Peter Reis**  
AIDS Healthcare Foundation  
*"Positive Healthcare"*

**Arne Beck**  
Kaiser Permanente  
*"The Cooperative Health Care Clinic--Preliminary Findings"*

**Reactors:** **Sheila Leatherman**  
United HealthCare Corporation

**Nancy Whitelaw**  
Henry Ford Health System

## **DINNER PRESENTATION**

Dark Side of the Loon

Thursday, November 21 ✧ 7:00-9:00 pm ✧ Prospect Bay A-C

**Speaker:**

**Paul R. Spitzer**  
Cooperative Oxford Laboratory

## THIRD BREAKOUT SESSION

TRACK I: Impact of Managed Care on Adults with AIDS or Physical Disabilities

Friday, November 22 ✧ 8:30-10:30 am ✧ Prospect Bay A-B

**Moderator:**

**Brian Burwell**  
The MEDSTAT Group

**Sandra Tanenbaum**  
Ohio State University  
College of Medicine

**Speakers:**

**Leonard Gruenberg**  
DataChron Health Systems, Inc.  
*"The Access, Use and Satisfaction of the Under 65 Medicare Disabled in HMOs and FFS Plans"*

**Margo Rosenbach**  
Health Economics Research  
*"How the Oregon Health Plan Serves People With Disabilities: System Design Issues and First-Year Impacts"*

**Teresa Fama**  
Robert Wood Johnson Foundation National Program Office  
*"Comparison of Physician and Hospital Use Among People with Chronic Illness in HMO and FFS Plans"*

**Reactors:**

**Gerben DeJong**  
National Rehabilitation Hospital Research Center

**Tony Dreyfus**  
Medicaid Working Group

**Lex Frieden**  
Baylor College of Medicine

## THIRD BREAKOUT SESSION

### TRACK II: Integrating Acute and Long-Term Care

Friday, November 22 ✧ 8:30-10:30 am ✧ Water's Edge

**Moderators:**

**Judith Feder**

Georgetown University  
Institute of Health Care Research and Policy

**Robert Friedland**

National Academy on Aging

**Speakers:**

**David Kidder**

Abt Associates, Inc.  
*"Results of the PACE Evaluation"*

**Nancy Miller**

Health Care Financing Administration  
Division of Aging and Disability  
*"Social Health Maintenance Organization Demonstration (S/HMO)"*

**Thomas Hamilton**

Wisconsin Department of Health and Family Services  
*"Integrated System of Managed Care for Frail Elders"*

**David Reuben**

University of California  
School of Medicine  
*"Primary Care of Long Term Nursing Home Residents: Approaches of Three HMOs"*

**Reactors:**

**Richard Bringewatt**

National Chronic Care Consortium

**Tony Hausner**

Health Care Financing Administration  
Office of Managed Care

**Michael Nolin**

University of Maryland  
Center for Health Program Development and Management

**Joshua Wiener**

The Urban Institute

## THIRD BREAKOUT SESSION

### TRACK III: Quality Outcomes

Friday, November 22 ✧ 8:30-10:30 am ✧ Shaw Bay A

**Moderator:** **Shoshanna Sofaer**  
George Washington University Medical Center  
Center for Health Outcomes Improvement Research

**Speakers:** **John Ware**  
New England Medical Center  
*"Medical Outcomes Study"*

**Ira Wilson**  
New England Medical Center  
*"Costs and Outcomes of AIDS Care in Managed Care and Fee-for-Service Systems"*

**David Zimmerman**  
University of Wisconsin, Madison  
*"QI<sup>2</sup>: Quality Improvement, Quality Indicators--The Power of Information"*

**Susan Denman**  
Philadelphia Geriatric Center  
*"Health Care for the Elderly: Where do Pathways Fit?"*

**Reactors:** **Richard Besdine**  
Health Care Financing Administration  
Health Standards and Quality Bureau

**Maureen Booth**  
University of Southern Maine  
Muskie Institute of Public Affairs

**Mary Jo Gibson**  
American Association of Retired Persons

## THIRD BREAKOUT SESSION

### TRACK IV: Risk Adjustment/Rate-Setting

Friday, November 22 ✧ 8:30-10:30 am ✧ Shaw Bay B-C

**Moderator:**

**Robert Hurley**  
Virginia Commonwealth University  
Medical Center

**Speakers:**

**Richard Kronick**  
University of California, San Diego  
*"Diagnostic Risk Adjustment for Medicaid"*

**Elizabeth Mauser**  
Health Care Financing Administration  
Office of Research and Demonstrations  
*"Social Health Maintenance Organization Demonstration (S/HMO)"*

**Arlene Ash**  
Boston University  
School of Medicine  
*"The Role of Risk-Adjusted Capitation in Protecting Sick People and Their Providers"*

**Mark Hornbrook**  
Kaiser Permanente  
*"Forecasting Health Plan Liability"*

**Peter Fox**  
PDF Incorporated  
*"Identifying High-Risk Medicare HMO Members"*

**Reactors:**

**Stanley Jones**  
George Washington University

**William Scanlon**  
U.S. General Accounting Office

## PLENARY

What Do We Know? Where Do We Go From Here?

Friday, November 22 ✧ 10:45 am-12:15 pm ✧ Prospect Bay A-C

**Moderator:** **Trish Riley**  
National Academy for State Health Policy

**Expert Panel:** **Brian Burwell**  
The MEDSTAT Group

**Judith Feder**  
Georgetown University  
Institute of Health Care Research and Policy

**Robert Hurley**  
Virginia Commonwealth University  
Medical College

**Shoshanna Sofaer**  
George Washington University Medical Center  
Center for Health Outcomes Improvement Research

**Sandra Tanenbaum**  
Ohio State University  
College of Medicine

## **LUNCHEON ADDRESS**

**Opportunities and Challenges for the Disabled in Managed Care**

**Friday, November 22 ✧ 12:30-2:00 pm ✧ Prospect Bay A-C**

**Keynote Address:**      **Bruce Vladeck**  
Administrator  
Health Care Financing Administration