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Advance Care Planning: Challenges and Opportunities

2-Part Webinar

October 26, 2020 and November 2, 2020

 **#SeriousIllnessCareNASEM**

Roundtable on Quality Care for People with Serious Illness

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ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS

October 26, 2020

Dear Colleagues:

Welcome to the workshop on *Advance Care Planning: Challenges and Opportunities*, hosted by the Roundtable on Quality Care for People with Serious Illness at the National Academies of Sciences, Engineering, and Medicine.

The workshop will explore the challenges and opportunities of advance care planning, acknowledge and highlight divergent viewpoints, and examine what is empirically known and not known about advance care planning and its outcomes. The workshop will identify areas where more data and research are needed to fill evidentiary gaps, as well as identify potential approaches to improve the practice of advance care planning.

Due to restrictions on travel and public gatherings as a result of the COVID-19 pandemic, the full-day workshop originally scheduled to be held in-person in Washington, DC, has been converted into two webinars to be held on October 26, 2020, and November 2, 2020.

The first webinar on October 26, 2020 will feature two sessions: *The Paradox of Advance Care Planning (ACP)* and *Interpreting the Evidence Base for ACP*. The second webinar to be held on November 2, 2020 will feature sessions on *Thinking Differently about ACP*, and *Practical Steps to More Effective ACP*. The final session of the webinar will feature a panel of experts sharing their reactions and lessons learned from the presentations and discussions.

A summary of this workshop will be published by the National Academies Press. The webinar's meeting materials as well as a video archive of the webinar will be available at: <https://www.nationalacademies.org/event/10-26-2020/advance-care-planning-challenges-and-opportunities-a-workshop>

We hope you will find the workshop presentations informative, thought-provoking, and inspiring, and that the suggestions made by the workshop participants will ultimately contribute to improved care and for people with serious illness.

Sincerely,

Robert M. Arnold, MD (Co-Chair)
Distinguished Service Professor of Medicine
Chief, Section of Palliative Care and
Medical Ethics
University of Pittsburgh
Chief Medical Officer, Palliative and
Supportive Care Institute of UPMC

JoAnne Reifsnyder, PhD, RN, FAAN (Co-Chair)
Executive Vice President, Clinical Operations
and Chief Nursing Officer
Genesis Healthcare
*Representing the Hospice and Palliative Nurses
Association*

ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS

**Advance Care Planning: Challenges and Opportunities
A Workshop**

Part 1
October 26, 2020
12:00-2:30 PM ET

WEBINAR NOTES

- Join the webcast via this link:
<https://nasem.zoom.us/j/93888599436?pwd=M0dRRDRIZDFrSm1nS3M0aEo1YzAvdz09>
- An archive of the video webcast and presentation slides will be available at:
<https://www.nationalacademies.org/event/10-26-2020/advance-care-planning-challenges-and-opportunities-a-workshop>
- Proceedings of the workshop will be published following National Academies procedures. Rapporteurs will compose the proceedings from the workshop transcript and external reviewers will examine the proceedings to make sure it accurately reflects workshop discussions and conforms to institutional policies.
- Interested in receiving updates from the Roundtable on Quality Care for People with Serious Illness or the National Academies of Sciences, Engineering, and Medicine's Health and Medicine Division?

Sign up for the **Roundtable** listserv at:

<https://www.nationalacademies.org/hmd/Activities/HealthServices/QualityCareforSeriousIllnessRoundtable.aspx>

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Roundtable on
Quality Care for People with Serious Illness

Advance Care Planning: Challenges and Opportunities

A Virtual Workshop

AGENDA

**WEBINAR 1: October 26, 2020
12:00 PM – 2:30 PM ET**

12:00 PM	<p>Welcome from the Roundtable on Quality Care for People with Serious Illness</p> <p>Peggy Maguire, JD Cambia Health Foundation</p> <p>James Tulsky, MD Harvard Medical School, Brigham and Women's Hospital, and Dana-Farber Cancer Institute</p> <p><i>Roundtable Co-Chairs</i></p>
12:05 PM	<p>Overview of the Webinar Series</p> <p>Robert Arnold, MD Distinguished Service Professor of Medicine, Chief, Section of Palliative Care and Medical Ethics, Director, Institute for Doctor-Patient Communication Medical Director, UPMC Palliative and Supportive Institute University of Pittsburgh Department of Medicine</p> <p>JoAnne Reifsnyder, PhD, MBA, MSN, FAAN Executive Vice President, Clinical Operations Chief Nursing Officer, Genesis HealthCare <i>Representing the Hospice and Palliative Nurses Association</i></p> <p><i>Planning Committee Co-Chairs</i></p>

Follow the [conversation](#):



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12:10 PM	Session One: The Paradox of Advance Care Planning (ACP) <i>Moderator:</i> JoAnne Reifsnyder, PhD, MBA, MSN, FAAN Genesis Healthcare <i>Speakers:</i> Maurine Stuart Volunteer, National Patient Advocate Foundation Wyvonia Woods Harris Volunteer, National Patient Advocate Foundation Bernard Lo, MD President Emeritus, The Greenwall Foundation Rebecca Sudore, MD Professor, University of California, San Francisco School of Medicine
12:50 PM	Audience Q&A
1:10 PM	Session Two: Interpreting the Evidence Base for Advance Care Planning <i>Moderator:</i> Susan E. Hickman, PhD Director, IU Center for Aging Research, Regenstrief Institute Professor, Indiana University Schools of Nursing & Medicine Cornelius and Yvonne Pettinga Chair in Aging Research Co-Director, IUPUI RESPECT Signature Center <i>Speakers:</i> Sean Morrison, MD Ellen and Howard C. Katz Professor and Chair, Brookdale Department of Geriatrics and Palliative Medicine Director, National Palliative Care Research Center Icahn School of Medicine at Mount Sinai Carole Montgomery, MD, FHM, MHSA Executive Medical Director, Respecting Choices Daren Heyland, MD, MSc, FRCPC Professor, Internal Medicine, Critical Care, Queen's University School of Medicine



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	Patricia Bomba, MD, MACP, FRCP Vice President & Medical Director, Geriatrics Excellus BlueCross BlueShield
1:50 PM	Panel Discussion
2:10 PM	Audience Q & A
2:25 PM	Closing Remarks
2:30 PM	Webinar Adjourns

Follow the [conversation](#):

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A Workshop

Part 1
October 26, 2020

SPEAKERS AND MODERATORS

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Chair, National Healthcare Decisions Day
NYS Coalition

Wyvonia Woods Harris

Volunteer
National Patient Advocate Foundation

Daren Heyland, MD, MSc, FRCPC

Clinician scientist, KGHRI
Director, Clinical Evaluation Research Unit,
Kingston General Hospital
Professor, Medicine and Epidemiology
Chair, Canadian Researchers at the End of Life
Network (CARENET)

Susan E. Hickman, PhD

Director, IU Center for Aging Research,
Regenstrief Institute
Professor, Indiana University Schools of Nursing
& Medicine
Cornelius and Yvonne Pettinga Chair in Aging
Research
Co-Director, IUPUI RESPECT Signature Center

Bernard Lo, M.D.

President Emeritus
The Greenwall Foundation

Carole Montgomery MD, FHM, MHSA

Executive Medical Director
Respecting Choices, A Division of C-TAC
Innovations

R. Sean Morrison, M.D.

Co-Director, Patty and Jay Baker National
Palliative Care Center
Director, National Palliative Care Research
Center
Director, Hertzberg Palliative Care Institute
Hermann Merkin Professor of Palliative Care

JoAnne Reifsnyder, PhD, RN, FAAN

Executive Vice President, Clinical Operations
and Chief Nursing Officer
Genesis Healthcare
Representing the Hospice and Palliative Nurses
Association

Maurine Stuart

Volunteer
National Patient Advocate Foundation

Rebecca Sudore, MD

Professor of Medicine
University of California, San Francisco

Advance Care Planning: Challenges and Opportunities
A Webinar Series

Part 1
October 26, 2020

SPEAKERS AND MODERATORS



Robert M. Arnold, MD, is a Professor in the Division of General Internal Medicine, Department of Medicine at the University of Pittsburgh and in the University of Pittsburgh Center for Bioethics and Health Law. He completed his medical school training at the University of Missouri-Kansas City and residency at Rhode Island Hospital. Subsequently he has been on the faculty at the University of Pittsburgh. In 2000, Dr. Arnold was named the first Leo H. Creip Chair of Patient Care. The chair emphasizes the importance of the doctor-patient relationship, particularly at the end of life. He is the Director of the Institute for Doctor-Patient Communication and the Medical Director of the UPMC Palliative and Supportive Institute. He is clinically active in palliative care. Dr. Arnold has published on end-

of-life care, hospice and palliative care, doctor-patient communication and ethics education. His current research interests are focused on educational interventions to improve communication in life-limiting illnesses and better understanding how ethical precepts are operationalized in clinical practice. He also is working with the UPMC Health System to develop system-wide, integrative palliative services throughout the health system. He is the Past-President of the American Society of Bioethics and Humanities as well as the American Academy of Hospice and Palliative Medicine.



Patricia Bomba, MD, MACP, FRCP, a nationally & internationally recognized palliative care/end-of-life expert, currently serves as Senior Medical Director, Geriatrics and Palliative Care for Excellus BlueCross BlueShield (BCBS). In her role, Dr. Bomba serves as Program Director for New York's Medical Orders for Life-Sustaining Treatment (MOLST) & eMOLST & chairs the MOLST Statewide Implementation Team. She is a founding member of National POLST, a member of the Executive Committee of the National POLST Plenary Assembly and chairs the Federal Public Policy Committee. She is a member of NCQA's Geriatric Measurement Advisory Panel (GMAP). She served on the Institute of Medicine's Committee that produced *Dying in America: Improving Quality and Honoring Individual*

Preferences Near the End of Life. She is a member of the NASEM Roundtable on Quality Care for People with Serious Illness. Prior to working at Excellus BCBS, Dr. Bomba spent four years in academic medicine and nearly two decades in private practice focused on the care of frail older adults and patients with multiple co-morbidities. During the first decade, she served as a medical director and the primary physician for residents in a 160-bed long term care facility where she developed the first physician-nurse practitioner team model in Rochester in 1983. Dr. Bomba is author of several articles on issues related to advance care planning, palliative care, elder abuse and end-of-life concerns. She has spoken extensively regionally, statewide, nationally and internationally to professionals, community groups and professional organizations on issues related to advance care planning, MOLST, palliative care, pain management, elder abuse and other

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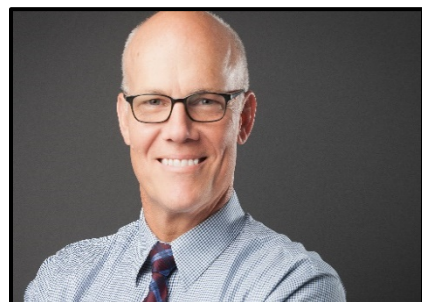
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geriatric topics. Dr. Bomba earned a bachelor's degree from Immaculata College and graduated from the University of Virginia School of Medicine. She completed her residency in Internal Medicine at the University of Rochester. Dr. Bomba is board certified in Internal Medicine, with Added Qualifications in Geriatric Medicine. She attended the Executive Development Program at the Wharton Business School.



Wyvonia Woods Harris is a retired registered nurse with 53 years of experience in health care. She serves as a volunteer with the American Cancer Society, the National Patient Advocate Foundation, and Wings of Love. Harris has also been an international blog-talk radio host since 2015. Harris serves on many board and committees, completed education in Community Health, and has received her Master of Science, Master of Divinity, and Doctor of Ministry. She is inspired by reading the Holy Bible, Legacies, Anthologies and Memoirs. Harris is a consultant and speaker for “Redeeming Grace and Joy” and “Wise Wy’s Grief

Community Advocacy.” She has authored and published three books *Merceda’s Touch: Grace For The Grief, Skies of My Self, Soul And Spirit: Psalms For Delight and Devotion*, and *Redeeming Grace: Look How Far God Has Brought Us*. She currently works from home as a surveyor, media and podcast announcer and has now taken up the hobby of virtual viewing on many platforms.



Daren Heyland, MD, MSc, FRCPC, is a Critical Care doctor and a Professor of Medicine at Queen’s University, Kingston, Ontario Canada. He also serves as the Director of the Clinical Evaluation Research Unit at the Kingston General Hospital which functions as a methods center for multicenter clinical research (See www.ceru.ca). For over a decade, he chaired the Canadian Researchers at the End of Life Network (CARENET, www.thecarenet.ca) which has a focus on developing and evaluating strategies to improve communication and decision-

making at the end of life. He was the lead investigator and founding scientific director for a Network Centers of Excellence in Technology Evaluation in seriously ill Elderly Patients (TECH VALUE NET, now called Canadian Frailty Network). More recently, he has developed a few web-based tools to aid lay people in decision-making related to serious illness, see www.planwellguide.com and www.myicuguide.ca. Overall, Dr. Heyland has published approximately 400 peer-reviewed papers, raised more than \$115 million in external grant support and given > 350 international presentations.

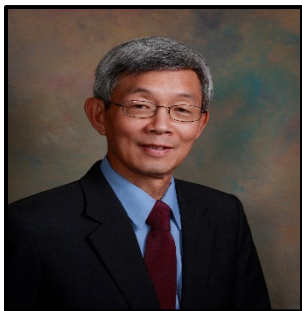
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Susan Hickman, PhD, is a geropsychologist, Professor in the Indiana University (IU) School of Nursing and IU School of Medicine, Cornelius and Yvonne Pettinga Chair in Aging Research, and Director of the IU Center for Aging Research at Regenstrief Institute, Inc.. She has been educating and conducting research on advance care planning and end-of-life decision making with a focus on the nursing facility since 1998. Dr. Hickman is currently funded by the National Institutes of Nursing Research to evaluate the quality of advance care planning decisions in the nursing facility setting by assessing concordance between current preferences and existing documentation (R01NR015255). Additionally, she is Co-Principal Investigator on a

National Institute on Aging (NIA) pragmatic randomized clinical trial to evaluate an advance care planning program for the caregivers of nursing home residents with Alzheimer's Disease and related dementias (R33AG057463) as well as a bioethics supplement to explore family experiences with these conversations (R33AG057463 -01S1). Dr. Hickman is also a co-investigator on two NIA-funded trials that include advance care planning interventions (R01AG056618; R01AG057733) and OPTIMISTIC, a \$30 million Centers for Medicare and Medicaid Services Innovation grant to reduce potentially avoidable hospitalizations through a multi-component intervention that includes advance care planning (<https://www.optimistic-care.org/>). Previous research funding includes grants from The Greenwall Foundation of New York, the Retirement Research Foundation, and the Walther Cancer Foundation. Dr. Hickman is a founding member of the National POLST Task Force and is currently Chair of the National POLST Research and Quality Assurance Committee. Additional activities include serving as the Associate Director of the Indiana Patient Preferences Coalition and as a member of the American Academy of Hospice and Palliative Medicine Research Committee.



Bernard Lo, MD is President Emeritus of the Greenwall Foundation and Professor Emeritus of Medicine and Director Emeritus of the Program in Medical Ethics at the University of California San Francisco (UCSF). A member of the National Academy of Medicine (NAM) Dr. Lo has chaired NAM committees on Sharing Clinical Trial Data (2015), Conflicts of Interest in Medical Research, Education, and Practice (2009), and Evidence-based Clinical Practice Guidelines for Prescribing Opioids for Acute Pain (2019). He is currently co-chairing a NAM committee on Ethical, Legal, and Regulatory Issues Associated with Neural Chimeras and

Organoids. Dr. Lo chairs the external advisory board of the Multiregional Clinical Trials Network and co-chaired the Standards Working Group of the California Institute for Regenerative Medicine, which recommended regulations for publicly funded stem cell research in California. Dr. Lo serves on the Board of Directors of Association for the Accreditation of Human Research Protection Programs (AAHRPP) and on the Medical Advisory Panel of Blue Cross/Blue Shield. Dr. Lo and his colleagues have published over 200 peer-reviewed articles on ethical issues concerning responsible oversight of research, decision-making near the end-of-life, the doctor-patient relationship, and conflicts of interest. During the COVID-19 he and his colleagues have written articles on allocation of ventilators, allocation of inpatient medications, and cardiopulmonary resuscitation. He is the author of *Resolving Ethical Dilemmas: A Guide for Clinicians* (6th ed., 2019). He continues to care for a panel of primary care internal medicine patients at UCSF.

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Carole Montgomery MD, FHM, MHSA is Executive Medical Director and Senior Faculty Consultant with Respecting Choices. She is a board-certified Internal Medicine physician with over 20 years' experience practicing hospital-based and post-acute medicine and another 8 years in executive leadership positions. Before joining Respecting Choices, she served provided executive leadership in a large integrated health system as they implemented the Respecting Choices programs, including all stages of Advance Care Planning and Shared Decision Making in Serious Illness. In 2018 she joined Respecting Choices full time. Montgomery earned her bachelor's degree from Michigan State University and her medical degree from Michigan State University College of Human Medicine. She completed her internship and internal medicine residency at Butterworth Hospital, Grand Rapids, Michigan. She earned her

master's degree in health management and policy from the University of Michigan's School of Public Health.



R. Sean Morrison, MD is the Ellen and Howard C. Katz Professor and Chair of the Brookdale Department of Geriatrics and Palliative Medicine. He is also Co-Director of the Patty and Jay Baker National Palliative Care Center and Director of the National Palliative Care Research Center, national organizations devoted to increasing the evidence base of palliative care in the United States. Nationally, he has served as President and Secretary of the American Academy of Hospice and Palliative Medicine. Dr. Morrison is the recipient of numerous awards, including the American Academy of Hospice and Palliative Medicine's PDIA National Leadership, Excellence in Research, and Visionary Awards; the American Cancer Society's Distinguished

Achievement in Cancer and Clinical Research Professor Awards; the American Geriatrics Society's Outstanding Achievement for Clinical Investigation Award; and the Jacobi Medallion (Mount Sinai's highest recognition). Dr. Morrison has received over \$65 million dollars in research funding and published over 200 research articles focused on improving care for seriously ill older adults and their families. His work has appeared in all major peer-reviewed medical journals, including the *New England Journal of Medicine*, *Annals of Internal Medicine*, and the *Journal of the American Medical Association*. He edited the first textbook on geriatric palliative care and has contributed to more than 15 books on the subject of geriatrics and palliative care. As one of the leading figures in the field of palliative medicine, Dr. Morrison has appeared numerous times on television and in print to discuss his own research and to comment on matters related to older adults and those with serious illness. R. Sean Morrison received his ScB from Brown University and his MD from the University of Chicago Pritzker School Of Medicine. He completed his residency training at the New York Hospital-Cornell Medical Center followed by post-graduate fellowship training at the Mount Sinai School of Medicine in New York City. He has been on Mount Sinai's faculty since 1995.

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Joanne Reifsnyder, PhD, RN, FAAN, has held executive and leadership roles in both for profit and not for profit health care settings. Her career clinical expertise is palliative and end of life care for older adults. She is currently the Chief Nursing Officer for Genesis HealthCare headquartered in Kennett Square, PA where she has positioned improving palliative and end of life care as a strategic priority for the company. Reifsnyder was co-founder and partner in Ethos Consulting Group, LLC, a company focused on program development, education/training and research/evaluation to advance end of life care. She completed a postdoctoral fellowship in psychosocial oncology at the University of Pennsylvania School of Nursing, and holds a PhD in nursing from the University of Maryland, a Master's Degree in Nursing from Thomas Jefferson University, and a Master's Degree in Business

Administration from George Washington University. She is Past President of the Board of Directors for the Hospice and Palliative Nurses Association, and currently serves on the Board of the Hospice Foundation of America. She is a member of American Nurses Association, the American Organization of Nurse Executives (AONE), HPNA and Sigma Theta Tau International, the Honor Society of Nursing. She is a fellow of the American Academy of Nursing. Dr. Reifsnyder has authored numerous abstracts, papers, and book chapters and was an editor of a 2011 multi-authored text, Population Health and co-author of Nurse's Law published in 2014.



Maurine "Mo" Stuart is a Board Certified Patient Advocate, Case Manager, frequent guest speaker, recent cancer survivor, and full time caregiver with over twenty years of professional healthcare experience. Originally from California, she now lives and works in rural West Virginia advocating, fundraising, and promoting initiatives that benefit under resourced, minorityzed, and underserved communities in Appalachia. Her passion projects include work with nonprofit organizations such as National Patient Advocate Foundation, Epilepsy Foundation of West Virginia, and most recently the EpiLAPSEy Project, as well as several others.



Rebecca Sudore, MD, is a geriatrician, palliative medicine physician, and clinician investigator. She also directs the Innovation and Implementation Center in Aging & Palliative Care (I-CAP) and the Vulnerable Populations for Aging Research Core of the NIA-funded Pepper Center.

Dr. Sudore conducts research to improve advance care planning and medical decision making for diverse, vulnerable older adults. To this end, she has designed, tested and disseminated innovative, patient centered tools including an easy-to-read advance directive in over 10 languages (<http://www.iha4health.org/our-services/advance-directive/>) and an interactive, advance care planning website called PREPARE (www.prepareforyourcare.org).

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PLANNING COMMITTEE MEMBERS

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Chair, National Healthcare Decisions Day NYS
Coalition

Jane Carmody, DNP, MBA, RN

Program Officer
John A. Hartford Foundation

Anna Gosline, MPH

Senior Director of Strategic Initiatives
Blue Cross Blue Shield of Massachusetts
Executive Director
Massachusetts Coalition for Serious Illness Care

Denise Hess, MDiv, BCC-HPCC, LMFT

Executive Director
Supportive Care Coalition
Representing Association of Professional Chaplains

Haiden Huskamp, PhD

30th Anniversary Professor of Health Care
Policy, Department of Health Care Policy
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Kimberly Sherell Johnson, MD

Associate Professor of Medicine
Senior Fellow in the Center for the Study of
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Duke University School of Medicine

Rebecca A. Kirch, JD

Executive Vice President of Healthcare Quality
and Value
National Patient Advocate Foundation

Bernard Lo, MD

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Hermann Merkin Professor of Palliative Medicine
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Judith R. Peres, LCSW-C

Long Term and Palliative Care Consultant
Clinical Social Worker
Board Member, Social Work Hospice and
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Leonard D. Schaeffer

Judge Robert Maclay Widney Chair
and Professor, University of Southern California

Rebecca Sudore, MD

Professor of Medicine
University of California, San Francisco

James A. Tulsky, MD

Chair, Department of Psychosocial Oncology and
Palliative Care, Dana-Farber Cancer Institute
Chief, Division of Palliative Medicine,
Department of Medicine, Brigham and Women's
Hospital
Co-Director, Harvard Medical School Center for
Palliative Care
Professor of Medicine, Harvard Medical School

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PLANNING COMMITTEE BIOGRAPHIES



Robert M. Arnold, MD (Co-Chair), is a Professor in the Division of General Internal Medicine, Department of Medicine at the University of Pittsburgh and in the University of Pittsburgh Center for Bioethics and Health Law. He completed his medical school training at the University of Missouri-Kansas City and residency at Rhode Island Hospital. Subsequently he has been on the faculty at the University of Pittsburgh. In 2000, Dr. Arnold was named the first Leo H. Creip Chair of Patient Care. The chair emphasizes the importance of the doctor-patient relationship, particularly at the end of life. He is the Director of the Institute for Doctor-Patient Communication and the Medical Director of the UPMC Palliative and Supportive Institute. He is clinically active in palliative care. Dr. Arnold

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Joanne Reifsnyder, PhD, RN, FAAN (Co-Chair), has held executive and leadership roles in both for profit and not for profit health care settings. Her career clinical expertise is palliative and end of life care for older adults. She is currently the Chief Nursing Officer for Genesis HealthCare headquartered in Kennett Square, PA where she has positioned improving palliative and end of life care as a strategic priority for the company. Reifsnyder was co-founder and partner in Ethos Consulting Group, LLC, a company focused on program development, education/training and research/evaluation to advance end of life care. She completed a postdoctoral fellowship in psychosocial oncology at the University of Pennsylvania School of Nursing, and holds a PhD in nursing from the University of Maryland, a Master's Degree in Nursing from Thomas Jefferson University, and a Master's Degree in Business

Administration from George Washington University. She is Past President of the Board of Directors for the Hospice and Palliative Nurses Association, and currently serves on the Board of the Hospice Foundation of America. She is a member of American Nurses Association, the American Organization of Nurse Executives (AONE), HPNA and Sigma Theta Tau International, the Honor Society of Nursing. She is a fellow of the American Academy of Nursing. Dr. Reifsnyder has authored numerous abstracts, papers, and book chapters and was an editor of a 2011 multi-authored text, Population Health and co-author of Nurse's Law published in 2014.

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that produced *Dying in America: Improving Quality and Honoring Individual Preferences Near the End of Life*. She is a member of the NASEM Roundtable on Quality Care for People with Serious Illness. Prior to working at Excellus BCBS, Dr. Bomba spent four years in academic medicine and nearly two decades in private practice focused on the care of frail older adults and patients with multiple co-morbidities. During the first decade, she served as a medical director and the primary physician for residents in a 160-bed long term care facility where she developed the first physician-nurse practitioner team model in Rochester in 1983. Dr. Bomba is author of several articles on issues related to advance care planning, palliative care, elder abuse and end-of-life concerns. She has spoken extensively regionally, statewide, nationally and internationally to professionals, community groups and professional organizations on issues related to advance care planning, MOLST, palliative care, pain management, elder abuse and other geriatric topics. Dr. Bomba earned a bachelor's degree from Immaculata College and graduated from the University of Virginia School of Medicine. She completed her residency in Internal Medicine at the University of Rochester. Dr. Bomba is board certified in Internal Medicine, with Added Qualifications in Geriatric Medicine. She attended the Executive Development Program at the Wharton Business School.



Jane Carmody DNP, RN has joined The John A. Hartford Foundation as a new Program Officer. Prior to joining the Foundation, Dr. Carmody held significant leadership positions with health care systems to include executive director of a large regional home health care and hospice organization for a newly formed health system, hospital chief nursing officer (CNO), health care system CNO and most recently a chief clinical leader for a large national home health care and hospice company. Dr. Carmody is a member of the ANA, AONE, NGNA, AGS, STTI and HFMA. She is certified as a nurse executive in practice (CENP) by the AONE, and as a nurse executive advanced (NEA-BC) by the ANCC. Dr. Carmody graduated from Mercy College in Des Moines with a diploma in nursing, from the University

of Nebraska at Omaha with a social work degree. She also holds an MBA from Creighton University and a DNP from Rush University.

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ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS



Anna Gosline, MPH, is the Executive Director of the Massachusetts Coalition for Serious Illness Care and the Senior Director of Strategic Initiatives in the Executive Office of Blue Cross Blue Shield of Massachusetts, which is the administrative home and primary funder of the Coalition. In her work at Blue Cross, Anna manages a diverse portfolio of policy, community and communications projects that touch on topics ranging from payment reform and health care costs to the opioid epidemic. She also leads the development of corporate-wide initiatives focused on serious illness and palliative care – from payment and

benefits, to provider partnerships and measurement, to community and policy work. Previously, Anna was the Director of Policy and Research at the Blue Cross Blue Shield of Massachusetts Foundation where she oversaw the Foundation’s \$1 million+ policy and research program. Before joining the Foundation, she managed a large-scale health system study for the state of Vermont. In a previous life, Anna was a health care journalist in the UK and Canada. Anna holds a master’s degree in health policy and management from the Harvard School of Public Health, a graduate certificate in science writing from the University of California, Santa Cruz and a bachelor’s degree from the University of Toronto.



Denise Hess, MDiv, BCC-HPCC, LMFT comes to palliative care through over a decade of work as a palliative care chaplain with Providence St. Joseph Health in Torrance, California. Denise has a master’s degree and license in marriage and family therapy, a master’s degree in divinity, and is an ordained minister with the Presbyterian Church (USA). She was board certified with the Association of Professional Chaplains in 2011 and received palliative care and hospice advanced certification in 2014. She is currently the Executive Director for the Supportive Care Coalition, a

national partnership of Catholic health ministries committed to advancing excellence in palliative care.



Haiden Huskamp, PhD, is a health economist and professor of health care policy. Dr. Huskamp has three primary areas of research: 1) mental health and substance use disorder policy; 2) prescription drug policy; and 3) the financing and utilization of end-of-life care services. She also serves as co-director of Harvard Medical School’s course on social and population sciences required of all first-year medical and dental students. Dr. Huskamp recently served as principal investigator for an R01 funded by the National Institute of Mental Health (NIMH) focused on factors that influence physician adoption and use of antipsychotic

medications, and currently serves as principal investigator for an R01 funded by the National Institute on Drug Abuse (NIDA) assessing the effects of new payment and delivery models on substance use disorder treatment. She recently served as principal investigator for an NIMH grant on the effect of mental health parity on individuals with severe mental illnesses and high mental health service costs. Dr. Huskamp has published numerous papers on the impact of

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managed care for mental health services on utilization patterns, costs, and quality of care. She recently served as a member of the Institute of Medicine Committee on Developing Evidence-Based Standards for Psychosocial Interventions for Mental Disorders. Dr. Huskamp is an expert on the impact of pharmacy management tools used to control prescription drug costs on drug utilization, cost, and quality of care. She has written numerous papers on the Medicare Part D drug benefit and its implications for vulnerable populations, including individuals with a mental illness and nursing home residents. Through a Robert Wood Johnson Foundation Investigator Award in Health Policy Research, Dr. Huskamp examined the social costs and benefits of newer psychotropic drugs to assess their social value and identify ways that the value of psychotropic drug spending can be increased. She serves as principal investigator on an NIH-funded U01 grant examining characteristics of provider organizations that influence the diffusion of new technologies, including prescription drugs. She also served as a member of the Institute of Medicine Committee on Accelerating Rare Diseases Research and Orphan Products Development. Dr. Huskamp's research on end-of-life care includes a study of the changing characteristics of the hospice industry and the effects of industry changes on the provision of end-of-life care, a study of the timing of discussions about hospice care that occur between physicians and patients with metastatic lung cancer, and a study of patient-level variation in hospice costs. She served as a member of the Institute of Medicine Committee on Care for Children Who Die and Their Families, and she recently authored a paper on the financing of end-of-life care services published in the Institute of Medicine report "Dying in America."



improving the quality of patient-centered care in the clinical encounter.

Kimberly S. Johnson, MD, MHS is an Associate Professor with Tenure in the Department of Medicine, Division of Geriatrics, Center for Aging, and Center for Palliative Care at Duke University Medical Center in Durham, North Carolina. Her research focuses on understanding and eliminating racial disparities in palliative and end-of-life care. She has published widely and is nationally recognized for her work investigating how cultural beliefs and preferences and organizational practices and policies may influence the use of hospice care by older African Americans. Dr. Johnson is the Director of the Duke Center for Research to Advance Health Care Equity (REACH Equity). The Center focuses on developing and testing interventions to reduce racial disparities by



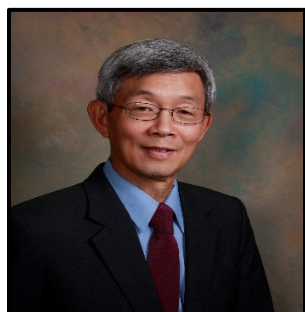
Cancer Action Network, directing development and execution of coordinated quality of life and survivorship research, policy and advocacy activities. A frequently invited speaker on the patient and family experience and person-centered care priorities and practices, Rebecca has authored numerous articles and book chapters, including publications in the *New England Journal of Medicine*, *Archives of Internal Medicine*, *JAMA Oncology*, *Health Affairs*, *Circulation* and other professional

Rebecca Kirch, JD is EVP of Healthcare Quality and Value for the National Patient Advocate Foundation (NPAF), providing strategic focus and leadership in bringing patient and caregiver voices and values to the forefront of health reform efforts. As a leading health policy expert and advocate in her field, Rebecca is dedicated to advancing person-centered policies and practices that put people at the heart of healthcare. Prior to joining NPAF in 2016, she served for 15 years with the American Cancer Society and its advocacy affiliate, the American Cancer Society

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journals. She is the recipient of numerous national awards, has been featured in multiple media outlets and also serves in leadership roles on several stakeholder advisory committees and advocacy coalitions. Rebecca is currently serving as a member of the National Academy of Science, Engineering and Medicine's Quality Care for People with Serious Illness Roundtable, as Quality of Life and Person-Centered Care task force co-chair for the American Congress of Rehabilitation Medicine, and a board member for children's oncology Care Camps.



Bernard Lo, MD is President Emeritus of the Greenwall Foundation and Professor Emeritus of Medicine and Director Emeritus of the Program in Medical Ethics at the University of California San Francisco (UCSF). A member of the National Academy of Medicine (NAM) Dr. Lo has chaired NAM committees on Sharing Clinical Trial Data (2015), Conflicts of Interest in Medical Research, Education, and Practice (2009), and Evidence-based Clinical Practice Guidelines for Prescribing Opioids for Acute Pain (2019). He is currently co-chairing a NAM committee on Ethical, Legal, and Regulatory Issues Associated with Neural Chimeras and

Organoids. Dr. Lo chairs the external advisory board of the Multiregional Clinical Trials Network and co-chaired the Standards Working Group of the California Institute for Regenerative Medicine, which recommended regulations for publicly funded stem cell research in California. Dr. Lo serves on the Board of Directors of Association for the Accreditation of Human Research Protection Programs (AAHRPP) and on the Medical Advisory Panel of Blue Cross/Blue Shield. Dr. Lo and his colleagues have published over 200 peer-reviewed articles on ethical issues concerning responsible oversight of research, decision-making near the end-of-life, the doctor-patient relationship, and conflicts of interest. During the COVID-19 he and his colleagues have written articles on allocation of ventilators, allocation of inpatient medications, and cardiopulmonary resuscitation. He is the author of *Resolving Ethical Dilemmas: A Guide for Clinicians* (6th ed., 2019). He continues to care for a panel of primary care internal medicine patients at UCSF.



R. Sean Morrison, M.D. is the Ellen and Howard C. Katz Professor and Chair of the Brookdale Department of Geriatrics and Palliative Medicine. He is also Co-Director of the Patty and Jay Baker National Palliative Care Center and Director of the National Palliative Care Research Center, national organizations devoted to increasing the evidence base of palliative care in the United States. Nationally, he has served as President and Secretary of the American Academy of Hospice and Palliative Medicine. Dr. Morrison is the recipient of numerous awards, including the American Academy of Hospice and Palliative Medicine's PDIA National Leadership, Excellence in Research, and Visionary Awards; the American Cancer Society's Distinguished

Achievement in Cancer and Clinical Research Professor Awards; the American Geriatrics Society's Outstanding Achievement for Clinical Investigation Award; and the Jacobi Medallion (Mount Sinai's highest recognition). Dr. Morrison has received over \$65 million dollars in research funding and published over 200 research articles focused on improving care for seriously ill older adults and their families. His work has appeared in all major peer-reviewed medical journals, including the *New England Journal of Medicine*, *Annals of Internal Medicine*, and the *Journal of the American Medical Association*. He edited the first textbook on geriatric palliative care and has contributed

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to more than 15 books on the subject of geriatrics and palliative care. As one of the leading figures in the field of palliative medicine, Dr. Morrison has appeared numerous times on television and in print to discuss his own research and to comment on matters related to older adults and those with serious illness. R. Sean Morrison received his ScB from Brown University and his MD from the University of Chicago Pritzker School Of Medicine. He completed his residency training at the New York Hospital-Cornell Medical Center followed by post-graduate fellowship training at the Mount Sinai School of Medicine in New York City. He has been on Mount Sinai's faculty since 1995.



Judith Peres, LCSW-C, is a clinical social worker with postgraduate training in cognitive/behavioral therapy and mind/body health. She has extensive experience in stress management, grief work, aging and palliative care. Her career spans over four decades in both Medicare and Medicaid health policy and direct clinical work. Her clinical practice includes Employee Assistance Program work for the Sheppard Pratt Institute in Baltimore, Maryland and work as both a psychotherapist and mind/body specialist for Kaiser Permanente. She draws on her experience in both psychotherapy and policy for her practice. Her practice focuses on assisting people with successful life transitions. Transitions represent the inner reorientation and redirection we all experience when faced with major life changes. Changes, even desired ones, can create stress, anxiety and depression. She uses her cognitive/behavioral experience as a therapist, plus her clinical training in stress management and mind/body health, to support persons undergoing change, to transform a perspective of limitation to one of possibility. Research has shown that these skills and approaches are especially beneficial in restoring emotional well-being during times of change in our careers, family life, relationships, health, grief and aging. In addition, she is a Medicare provider and helps elders and their families navigate the uncharted waters towards successful aging with dignity and independence.

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Leonard D. Schaeffer is the founding Chairman & CEO of WellPoint (now Anthem) which serves nearly 40 million medical members and has annualized revenues of \$92 billion. He is currently the Judge Robert Maclay Widney Chair and Professor at the University of Southern California and is a Senior Advisor to Starr Investment Holdings. Schaeffer was Chairman & CEO of WellPoint from 1992 through 2004 and continued to serve as Chairman through 2005. Under his leadership, WellPoint was selected by FORTUNE magazine as America's "Most Admired Health Care Company" for six consecutive years; named by BusinessWeek as one of the 50 best performing public companies for three consecutive years; and identified by Forbes magazine as America's best large health insurance company. Schaeffer was selected by BusinessWeek magazine as one of the "Top 25 Managers of the Year" and by Worth magazine as one of the "50 Best CEOs in America." In 1986, Schaeffer was recruited as CEO to WellPoint's predecessor company, Blue Cross of California, when it was near bankruptcy. He managed the turnaround of Blue Cross of California and the IPO creating WellPoint in 1993. During his tenure, WellPoint made 17 acquisitions and endowed four charitable foundations with assets of over \$6 billion. Under Schaeffer's leadership, WellPoint's value grew from \$11 million to over \$49 billion. In 2009, Schaeffer established a new research center at USC. The Schaeffer Center for Health Policy and Economics emphasizes an interdisciplinary approach to research and analysis to promote value in health care and to support evidence-based health policy. In 2014, he established the Schaeffer Fellows in Government Service program which supports 50 undergraduates in high-level, summer government internships. He has endowed chairs in health care financing and policy at the Brookings Institution, Harvard Medical School, the National Academy of Medicine (NAM), U.C. Berkeley and USC. Previously, Schaeffer was President and CEO of Group Health, Inc. of Minnesota, a staff model HMO. Schaeffer was also EVP and COO of the Student Loan Marketing Association, the national secondary market for student loans and earlier was a Vice President of Citibank and a consultant specializing in design and installation of large scale financial and management information systems. In the federal government, he served as Administrator of the Health Care Financing Administration (now CMS) and was responsible for Medicare and Medicaid. He was also the Assistant Secretary for Management and Budget of the federal Department of Health and Human Services. Previously, Schaeffer was Director of the Bureau of the Budget for the State of Illinois and also served as Chairman of the Illinois Capital Development Board and as Deputy Director for Management, Illinois Department of Mental Health and Developmental Disabilities. Schaeffer is active on the boards of numerous businesses, philanthropic and professional organizations. He was awarded a Doctor of Humane Letters (Hon) from USC and received the inaugural USC Sol Price Award for his lifetime achievements as a business leader, policy expert and philanthropist. He was the Regent's Lecturer at the University of California at Berkeley, a Gilbert Fellow at Princeton, and a Williams Fellow at RAND. He is a member of NAM and is the Chair of the Roundtable on Quality Care for People with Serious Illness. He is the Vice Chair of the Board of Trustees at the Brookings Institution. A native of Evanston, Illinois, he is a graduate of Princeton University.

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Rebecca Sudore, MD, is a geriatrician, palliative medicine physician, and clinician investigator. She also directs the Innovation and Implementation Center in Aging & Palliative Care (I-CAP) and the Vulnerable Populations for Aging Research Core of the NIA-funded Pepper Center. Dr. Sudore conducts research to improve advance care planning and medical decision making for diverse, vulnerable older adults. To this end, she has designed, tested and disseminated innovative, patient centered tools including an easy-to-read advance directive in over 10 languages (<http://www.iha4health.org/our-services/advance-directive/>) and an interactive, advance care planning website called PREPARE (www.prepareforyourcare.org).



James Tulsky, M.D. is Chair of the Department of Psychosocial Oncology and Palliative Care at Dana-Farber Cancer Institute, Chief of the Division of Palliative Medicine at Brigham and Women's Hospital, and Professor of Medicine and Co-Director of the Center for Palliative Care at Harvard Medical School. He is a Founding Director of VitalTalk (www.vitaltalk.org), a non-profit devoted to nurturing healthier connections between clinicians and patients through communication skills teaching. Dr. Tulsky received his A.B. from Cornell University, his M.D. from the University of Illinois College of Medicine at Chicago, and completed internal medicine training at the University of California, San Francisco (UCSF). He continued at UCSF as chief medical resident and subsequently as a Robert Wood Johnson Clinical Scholar. He was on the faculty of Duke University, last as Chief of Duke Palliative Care, from 1993 until 2015, when he joined Dana-Farber Cancer Institute. Dr. Tulsky has a longstanding research interest in clinician-patient communication and quality of life in serious illness and has published widely in these areas.