

Physician-Focused Payment Model Technical Advisory Committee

June 7-8, 2022 – PTAC Public Meeting Assessing Best Practices in Care Delivery for Population-Based (PB) Total Cost of Care (TCOC) Models

Presenter and Panelist Biographies

Listening Session 1

(June 7, 10:30 a.m. – 12:00 p.m. EDT)

Subject Matter Experts

- [Debbie Zimmerman, MD](#), Corporate Chief Medical Officer, Lumeris
- [David Kendrick, MD, MPH](#), Principal Investigator and CEO, MyHealth Access Network
- [Yi-Ling Lin](#), Healthcare Actuary & Financial Strategist, Terry Group

Previous Submitter

- [Shari M. Erickson, MPH](#), Chief Advocacy Officer and Senior Vice President, Governmental Affairs and Public Policy, American College of Physicians; *The "Medical Neighborhood" Advanced Alternative Payment Model (AAPM) (Revised Version)* proposal

Listening Session 2

(June 7, 1:00 p.m. – 2:30 p.m. EDT)

Subject Matter Experts

- [David C. Grossman, MD, MPH](#), Interim Senior Vice President, Social and Community Health, Kaiser Permanente
- [Ali Khan, MD, MPP](#), Chief Medical Officer, Oak Street Health
- [Dana Gelb Safran, ScD](#), President and Chief Executive Officer, National Quality Forum
- [Adam Weinstein, MD](#), Chief Medical Information Officer, DaVita, Inc.

Listening Session 3

(June 8, 9:35 a.m. – 10:35 a.m. EDT)

Subject Matter Experts

- [Chris Chen, MD](#), Chief Executive Officer, ChenMed
- [Palav Babaria, MD, MHS](#), Chief Quality Officer and Deputy Director, Quality and Population Health Management, California Department of Health Care Services; and
- [Paul Leon, RN, BSN](#), Founder, CEO and President, Illumination Foundation [*Co-Presenters*]

Panel Discussion

(June 8, 10:45 a.m. – 12:00 p.m. EDT)

Subject Matter Experts

- [Lee McGrath, MHSA](#), Executive Vice President, Healthcare Services, Premera Blue Cross - *Payer Perspective*
- [Gary Puckrein, PhD](#), President and Chief Executive Officer, National Minority Quality Forum - *Patient Advocacy Perspective*
- [Robert Saunders, PhD](#), Senior Research Director, Health Care Transformation, Duke-Margolis Center for Health Policy - *Academic/Policy Research Perspective*
- [Kristofer Smith, MD, MPP](#), Chief Clinical Officer, Prospero Health - *Provider Perspective*

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Listening Session 1

(June 7, 10:30 a.m. – 12:00 p.m. EDT)

Subject Matter Experts

Debbie Zimmerman, MD, Lumeris



In her role as Corporate Chief Medical Officer for Lumeris, Dr. Debbie Zimmerman builds the clinical strategy for the organization to support the Lumeris operating model. She directs the physician leadership team in supporting health systems in transforming their organizations to deliver value-based care, including developing and implementing clinical programs and quality management functions. Dr. Zimmerman also leads Lumeris University, where she is responsible for all internal employee training and onboarding, physician mentoring and primary care physician (PCP) boot camps, clinical content, and the Lumeris Innovation Conference. She is also Chief Medical Officer for Essence Healthcare, a high performing Medicare Advantage plan which has averaged 4.5 Stars for the last 12 years.

Dr. Zimmerman has a long and distinguished history of medical leadership at health plans such as Cigna, Group Health Plan and Health Partners of the Midwest. Before joining Essence Healthcare, she served as Chief Medical Officer of Mercy Health Plans, a provider-sponsored plan owned by Sisters of Mercy. She is also an accomplished entrepreneur, having co-founded a successful disease and complex case management firm. Dr. Zimmerman practiced internal medicine for 15 years and is licensed to practice in California and Missouri.

David Kendrick, MD, MPH, MyHealth Access Network

Dr. David Kendrick is the Principal Investigator and Chief Executive Officer (CEO) of MyHealth Access Network, Oklahoma's non-profit health information network, which ensures that every Oklahoman's complete health record is securely available where and when they need it for care and health decision-making. He is the immediate past chair of the Board of Directors for the National Committee for Quality Assurance (NCQA), which developed the first comprehensive quality measurement programs with the Healthcare Effectiveness Data and Information Set (HEDIS), as well as certification programs for Patient Centered Medical Homes and Specialty Care, as well as the new Data Aggregator Validation Program. Dr. Kendrick is also a member of the board of the Patient Centered Data Home and previously served on both the boards of the Strategic HIE Collaborative and the Networks for Regional Health Improvement before their recent merger to become the Civitas Networks for Health.



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(June 7, 10:30 a.m. – 12:00 p.m. EDT)

Subject Matter Experts (Continued)

David Kendrick, MD, MPH, MyHealth Access Network (Continued)

Dr. Kendrick served as the Senior Counsel for Interoperability to National Health IT Coordinator, Dr. Karen DeSalvo and has served as a consultant to the Office of the National Coordinator for Health IT as well as the Centers for Medicare & Medicaid Services (CMS) and other State and Federal Agencies. Dr. Kendrick has been the principal investigator for the Center for Medicare and Medicaid Innovation (CMMI's) Comprehensive Primary Care Initiative (CPC+), and the Accountable Health Communities programs in Oklahoma. Dr. Kendrick also chairs the Department of Medical Informatics and serves as the Assistant Provost for Strategic Planning for the Oklahoma University (OU) Health Sciences Center. He received his BS in Chemical Engineering and MD from the University of Oklahoma.

Yi-Ling Lin, Terry Group



Ms. Yi-Ling Lin is a Healthcare Actuary and Financial Strategist. She is a pioneer in the development of sophisticated analytics that support organizations in navigating the new and constantly changing healthcare environment. In addition, Ms. Lin has over 25 years of experience advising clients on strategic planning, pricing, and contract negotiations. Ms. Lin has served as the lead health consulting actuary for various sized clients ranging from jumbo to mid-market.

She has also led a team of actuaries whose functions include pricing health premiums and premium-equivalent rates, calculating reserves, providing actuarial pricing, plan experience reporting and evaluating health care reform financial impacts and strategic direction. Ms. Lin has also worked with hospital systems to evaluate carrier contracts, measure financial performance, and establish reporting and analytics to support strategic decision making.

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Listening Session 1

(June 7, 10:30 a.m. – 12:00 p.m. EDT)

Previous Submitter

Shari M. Erickson, MPH, American College of Physicians

(The "Medical Neighborhood" Advanced Alternative Payment Model (AAPM) (Revised Version) proposal)

Ms. Shari Erickson currently serves as Chief Advocacy Officer and Senior Vice President of Governmental Affairs and Public Policy with the American College of Physicians (ACP). In this role, Ms. Erickson oversees the operations of the Washington, DC office and manages ACP's overall advocacy and policy initiatives relating to Congress and federal regulatory agencies, including the Department of Health and Human Services (HHS), Centers for Medicare & Medicaid Services (CMS), CMS' Center for Medicare and Medicaid Innovation (CMMI), and other federal bodies. Ms. Erickson also oversees ACP's Department of Medical Practice, which is responsible for the ongoing development and maintenance of programs, products, tools, and services to assist medical practices with regulatory compliance and practice transformation. In addition, Ms. Erickson currently serves as Co-Chair of the Primary Care Collaborative's (PCC) Public Policy and Advocacy Workgroup. Before coming to ACP, Ms. Erickson was a Senior Program Director with the National Quality Forum (NQF) in Washington, D.C. where she was responsible for managing an array of projects that support NQF's national strategy for health care quality measurement and reporting. Ms. Erickson received her Master of Public Health degree from the Johns Hopkins Bloomberg School of Public Health and her Bachelor of Arts and Bachelor of Arts-International Studies degrees from Miami University in Ohio.



Listening Session 2

(June 7, 1:00 p.m. – 2:30 p.m. EDT)

Subject Matter Experts

David C. Grossman, MD, MPH, Kaiser Permanente



Dr. David Grossman is Interim Senior Vice President of Social and Community Health for Kaiser Foundation Health Plan, Inc. and Hospitals. He leads Kaiser Permanente's social health strategy in partnership with the Permanente Medical Groups and oversees the organization's public health advocacy and response to the COVID-19 pandemic. Dr. Grossman's decades of experience include serving as community health executive for Kaiser Permanente from 2017 to 2020, executive medical leader and research investigator for Group Health Cooperative, professor at the University of Washington, and Harborview Injury Prevention & Research Center director. He also served as a member and chair of the United States Preventive Services Task Force from 2008 to 2018. A board-certified pediatrician, Dr. Grossman completed his residency at the University of

North Carolina at Chapel Hill and was a Robert Wood Johnson Clinical Scholar at the University of Washington. He is a graduate of the University of California, Los Angeles (UCLA) School of Medicine and the University of California, Berkeley.

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(June 7, 1:00 p.m. – 2:30 p.m. EDT)

Subject Matter Experts (Continued)

Ali Khan, MD, MPP, Oak Street Health



Dr. Ali Khan is the Chief Medical Officer, Value Based Care Strategy at Oak Street Health, where he leads efforts in managed care strategy, clinical design and public policy. He joined Oak Street Health in 2019 as Executive Medical Director of the Heartland Division and continues to practice general internal medicine. Prior to Oak Street, Dr. Khan served as CareMore Health's Clinical Design Officer and in leadership roles at Iora Health.

Dr. Khan serves on the clinical faculty of the University of Chicago, Pritzker School of Medicine and is a Director on the American Board of Internal Medicine's Internal Medicine Specialty Board. He was recognized as one of Modern

Healthcare's Top 25 Emerging Leaders in 2021 and Crain's Chicago Business' Notable Executives of Color in Health Care in 2022. Dr. Khan is a fellow of the California Health Care Foundation and Leadership Greater Chicago. Dr. Khan completed his residency at Yale-New Haven Hospital. He is a graduate of the Harvard Kennedy School and VCU's Medical College of Virginia, earning joint M.D. and M.P.P. degrees as a Harvard Public Service Fellow, and VCU's B.S./M.D. Guaranteed Admissions Program in Medicine.

Dana Gelb Safran, ScD, National Quality Forum

Dr. Dana Gelb Safran is President & CEO of the National Quality Forum (NQF). In addition to overseeing NQF's longstanding function as steward for our nation's portfolio of healthcare quality measures, Dr. Safran is leading the expansion of NQF's portfolio of products and services to advance healthcare quality, outcomes, equity, and affordability. Dr. Safran is an internationally recognized healthcare executive with a unique blend of accomplishment in business and academia. A central feature of her work has been combining the science of quality measurement with the art of its use to drive significant change in the quality, outcomes, and affordability of care. Dr. Safran's prior roles include serving for more than a decade as a senior executive at Blue Cross Blue Shield of Massachusetts (BCBSMA), where she was a lead architect of the BCBSMA Alternative Quality Contract (AQC), which is widely credited with having catalyzed the value-based payment movement among public



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Subject Matter Experts (Continued)

Dana Gelb Safran, ScD, National Quality Forum (Continued)

and private payers nationally. She was also a founding member of the executive team at Haven, a joint venture of Amazon, Berkshire Hathaway, and JPMorgan Chase to achieve better health outcomes, care experiences, and costs of care through innovation in care delivery, benefit design and purchasing. Most recently, she was an executive team member at WELL Health, Inc., a health care technology company. Dr. Safran is on the faculty of Tufts University School of Medicine and has held a broad range of advisory roles in the public sector and internationally supporting efforts to improve health and healthcare through effective uses of performance measurement. Since 2017, she has served as a Commissioner of the Medicare Payment Advisory Commission (MedPAC). Dr. Safran holds a BA in Biology and Government from Wesleyan University and completed her post-graduate studies at the Harvard School of Public Health to earn an ScM and ScD in Health Policy and Management.

Adam Weinstein, MD, DaVita, Inc.



Dr. Adam Weinstein is a nephrologist from Maryland and DaVita's Chief Medical Information Officer (CMIO). Following training at the University of Maryland Medical Center, he co-founded and led the Kidney Health Center of Maryland for a decade. Dr. Weinstein has also worked as a clinical VP (covering population health) in the University of Maryland Medical System; and from 2010 to 2017 he served on the Maryland Healthcare Commission (part of Maryland's CMS Waiver program), and on the Renal Physicians Association (RPA) Board of Directors.

For more than a decade, Dr. Weinstein has participated in a variety of projects, presentations, and workgroups regarding alternative payment models for kidney care. He is currently involved with Renal Physicians Association (RPA) nephrology advocacy workgroups, and supports various aspects of DaVita's participation in the CMMI Kidney Care Models. Dr. Weinstein also continues to maintain a small clinical practice and serves as the representative to the American Medical Association's (AMA's) Relative Value Update Committee (RUC) on behalf of the Renal Physicians Association.

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Listening Session 3
(June 8, 9:35 a.m. – 10:35 a.m. EDT)

Subject Matter Experts

Christopher Chen, MD, ChenMed



Dr. Chris Chen is Chief Executive Officer of ChenMed, a premier physician-led, technology-enabled healthcare organization. A champion for equitable health outcomes, ChenMed is transforming the care of underserved, overlooked seniors. Dr. Chen is a bold innovator leading a revolution in healthcare through a global full-risk model; custom-designed physician training programs; and a proprietary technology platform, purpose-built for value-based care. He has led ChenMed to remarkable outcomes – such as equalized health inequities, 30-50% fewer hospitalizations, and high net promoter scores. Since becoming ChenMed’s CEO in 2009, Dr. Chen has built the decades old, highly successful ChenMed model into a scalable organization now spanning dozens of cities

across many states. ChenMed’s unique approach, proprietary technological capabilities, and results have led it to be named to *Newsweek’s* “Most Loved Workplaces” list, *Fortune Magazine’s* “Change the World” list, as well as earning recognition by the White House, the Department of Health and Human Services, and the U.K. National Health System. ChenMed has also been featured in publications such as *Modern Healthcare*, *Health Affairs*, *Forbes*, *The Economist*, *Wall Street Journal*, *New England Journal of Medicine*, *The Guardian*, and *Medical Economics* (which named ChenMed, “Best Primary Care System in the U.S.”) Dr. Chen graduated from the University of Miami’s Honors Program in Medicine. He went on to complete his medical training at Beth Israel Deaconess, a Harvard University teaching hospital, after which he completed a fellowship in cardiology at Cornell University Medical College in Manhattan, New York. A board-certified cardiologist, Dr. Chen sees patients at the company’s Miami Gardens, Florida medical center.

Palav Babaria, MD, MHS, California Department of Health Care Services

Dr. Palav Babaria was appointed Chief Quality Officer and Deputy Director of Quality and Population Health Management of the California Department of Health Care Services (DHCS) beginning in March 2021. In that role, she oversees all efforts around quality, equity, value-based care and population health management across the Medi-Cal program. Prior to joining DHCS, she served as Chief Administrative Officer for Ambulatory Services at the Alameda Health System (AHS) where she was responsible for all outpatient clinical operations, quality of care, and strategy for primary care, specialty care, dental services, and integrated and specialty behavioral health, as well as executive sponsor for value-based programs including the Medi-Cal 1115 Waiver. She also has over a decade of global health experience and her work has been published



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Subject Matter Experts (Continued)

Palav Babaria, MD, MHS, California Department of Health Care Services (Continued)

in the *New England Journal of Medicine*, *Academic Medicine*, *Social Science & Medicine*, *Los Angeles Times*, and *New York Times*. Dr. Babaria received her bachelor's degree from Harvard College, as well as her MD and Master's in health science from Yale University. She completed her residency training in internal medicine and global health fellowship at the University of California, San Francisco.

Paul Leon, RN, BSN, Illumination Foundation

Dr. Paul Leon is the Founder, CEO, and President of the Illumination Foundation (IF), a grassroots non-profit organization whose mission is to disrupt the cycle of homelessness by providing stable housing and wrap-around services to homeless families through their programs. Mr. Leon also pioneered IF's Recuperative Care Program, now the country's largest program, to manage the discharge of homeless patients from hospitals.



He is also a Senior Fellow of the Future of Nursing: *Campaign for Action*, an initiative of AARP Foundation, AARP, and the Robert Wood Johnson Foundation to improve America's health through Nursing. As a County of Orange Health Care Agency Public Health Nurse, Mr. Leon was instrumental in the conception and development of the Puerto Rico Comprehensive Health Assessment Team for the homeless (CHAT-H) and the Mobile Unit Teams (MUT), bringing targeted services to the underserved at the individual, family, community, and systems levels of practice.

Mr. Leon served as a speaker and consultant for pioneering innovative funding methods for recuperative care with the Health Resources and Services Administration (HRSA) across the country and as CEO & Founder of the Illumination Foundation, Mr. Leon has been recognized for the foundation's work with the PIMCO Leadership Circle Award and the James Irvine Foundation Leadership Award; and the Illumination Foundation was named one of the top ten non-profit organizations in Orange County. Mr. Leon was named one of 10 AARP Well-Being Champions, and in 2019 won the AARP Purpose Prize Award.

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Panel Discussion
(June 8, 10:45 a.m. – 12:00 p.m. EDT)

Subject Matter Experts

Lee McGrath, MHA, Premera Blue Cross
Payer Perspective



Ms. Lee McGrath is the Executive Vice President responsible for Healthcare Services at Premera Blue Cross. Ms. McGrath has extensive experience in both the provider and payer space, focused on payment reform and population health management. She joined Premera in 2018 after spending several years working for other BlueCross Blue Shield Association plans, serving as the Divisional Vice President of Network Strategy and Innovation at Health Care Service Corporation (HCSC) in Illinois. Ms. McGrath was also President of Illinois Health Partners, a joint venture between DuPage Medical Group and Edward Health Ventures, one of the largest clinically integrated networks in the Chicagoland area – managing over 250,000 Health Maintenance Organization (HMO) and Accountable Care Organization (ACO) patients. At Premera, Ms. McGrath is focused on improving healthcare through better solutions that focus on quality and lower cost, and through building relationships in the provider space that lead to better partnerships.

Gary Puckrein, PhD, National Minority Quality Forum
Patient Advocacy Perspective

Dr. Gary Puckrein is the founding President and Chief Executive Officer of the National Minority Quality Forum (NMQF), a non-profit healthcare research, education, and advocacy organization headquartered in Washington, DC. The mission of NMQF is to reduce patient risk by assuring optimal care for all. NMQF conducts evidence-based, data-driven initiatives to eliminate premature death and preventable illness. NMQF's vision is an American health services research, delivery, and financing system whose operating principle is to reduce patient risk for amenable morbidity and mortality while improving quality of life. Dr. Puckrein also serves as the Executive Director of the Alliance of Minority Medical Associations (a collaborative effort of the Asian and Pacific Physicians' Association, the Association of American Indian Physicians, the Interamerican College of Physicians and Surgeons, and the National Medical Association), which was formed on the basis of evidence-based data that highlight significant disparities in healthcare treatment plans and outcomes among many underserved populations within the United States. Dr. Puckrein received his master's and doctorate degrees from Brown University.



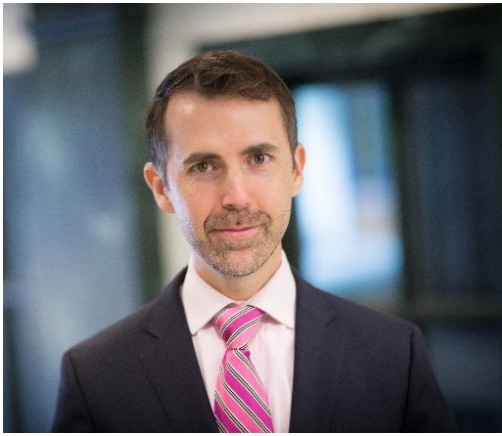
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Panel Discussion

(June 8, 10:45 a.m. – 12:00 p.m. EDT)

Subject Matter Experts (Continued)

Robert Saunders, PhD, Duke-Margolis Center for Health Policy
Academic/Policy Research Perspective



Dr. Robert Saunders is Senior Research Director, Health Care Transformation, at the Duke-Margolis Center for Health Policy. He is part of the Center’s executive team and leads the strategic design, management, and direction of the health care transformation research domain within the Center. The strategic goals for his portfolio include generating practical evidence on payment and delivery reforms, identifying lessons learned from COVID, developing new ways to meet people’s social needs and improve health equity, supporting North Carolina and other states in their efforts to improve health and value, and informing policy through convenings and stakeholder engagement.

Prior to joining Duke-Margolis, Dr. Saunders was a Senior Director and then Senior Advisor to the President of the National Quality Forum, Senior Program Officer at the Institute of Medicine, and managed health care legislative affairs for Representative Rush D. Holt. He has a PhD in physics from Duke University, where he focused on improving medical imaging for early-stage cancer diagnosis, and an undergraduate degree from William and Mary.

Kristofer Smith, MD, MPP, Prospero Health
Provider Perspective

As Chief Clinical Officer of Prospero Health, Dr. Kristofer Smith leads the organization’s efforts to establish a high quality and clinically effective home-based medical care model for patients with serious illness. He oversees clinical model design, as well as quality of care standards and clinical improvement activities. He also leads the provider and strategic relationship group which works to create partnerships that will improve enrollment effectiveness. His most recent prior role was President of naviHealth’s Home-based Medical Care division. In that position Dr. Smith oversaw the build, deployment, operations and strategy for naviHealth’s home-based offering to frail elderly patients. Prior to naviHealth, Dr. Smith was the SVP of Population Health at Northwell Health. In this role he built



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Subject Matter Experts (Continued)

Kristofer Smith, MD, MPP, Prospero Health (Continued)

Provider Perspective

and led the nation's most successful home-based medical care program under the Independence at Home Medicare demonstration. He also served as the medical director for Post-Acute Care Services and Chief Medical Officer for Northwell's insurance offering.

He has published papers on advanced care models for the frail elderly and has been a co-investigator on grants investigating the outcomes of high-intensity primary care programs. Additionally, he has worked with associations such as the American College of Physicians, Center to Advance Palliative Care, the Coalition to Transform Advanced Care and the American Academy of Home Care Medicine on health care reform. He currently serves on the board of the American Academy of Home Care Medicine.

Dr. Smith graduated with a degree in sociology from Princeton University and a Master of Public Policy in health policy from Harvard University. He received his Medical Degree from Boston University School of Medicine and completed a residency and chief residency in Internal Medicine at the Mount Sinai Medical Center. Dr. Smith is board certified in Internal Medicine as well as Hospice and Palliative care.