TAB 4:

AGENDA
# Conference At A Glance

**Wednesday, November 20**

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<thead>
<tr>
<th>Time</th>
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<tbody>
<tr>
<td>4:15</td>
<td>Conference Registration</td>
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<tr>
<td>5:30-7:00</td>
<td>Opening Reception</td>
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<tr>
<td>7:00-9:30</td>
<td>Dinner/Welcome</td>
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<tr>
<td></td>
<td><strong>Duckblind Lounge and Bayview Restaurant</strong></td>
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<tr>
<td></td>
<td><strong>Keynote Speaker:</strong> John Hockenberry, NBC News</td>
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<td>Robyn Stone</td>
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<td>Jack Ebeler</td>
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<td>Theresa Varner</td>
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**Thursday, November 21**

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<tr>
<th>Time</th>
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<tbody>
<tr>
<td>7:30-8:30</td>
<td>Breakfast Buffet</td>
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<tr>
<td>8:30-10:15</td>
<td>“Can Managed Care Serve People with Disabilities? The Policy Debate...The Need for Research”</td>
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<td></td>
<td>Trish Riley</td>
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<td>Robyn Stone</td>
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<td>Sandra Harmon-Weiss</td>
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<td>Michael Bailit</td>
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<td>Allan Bergman</td>
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<td><strong>Prospect Bay A-C</strong></td>
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<tr>
<td>10:15-10:30</td>
<td>Break</td>
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<tr>
<td>10:30-12:30</td>
<td>First Breakout Sessions</td>
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<td><strong>Prospect Bay A-B</strong></td>
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<td><strong>Water’s Edge</strong></td>
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<td><strong>Shaw Bay A</strong></td>
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<td><strong>Shaw Bay B-C</strong></td>
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<tr>
<td>12:30-12:45</td>
<td>Break</td>
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<tr>
<td>12:45-2:00</td>
<td>Luncheon Plenary</td>
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<td>2:00-2:15</td>
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<td>2:15-4:15</td>
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<td><strong>Shaw Bay B-C</strong></td>
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<tr>
<td>4:15-7:00</td>
<td>Break</td>
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<tr>
<td>7:00-9:00</td>
<td>Dinner Presentation</td>
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**Friday, November 22**

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<tr>
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<tr>
<td>7:30-8:30</td>
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<td>10:30-10:45</td>
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<tr>
<td>12:15-12:30</td>
<td>Break</td>
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<tr>
<td>12:30-2:00</td>
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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 |
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<tr>
<td>Sandra Tanenbaum</td>
<td>Ohio State University College of Medicine</td>
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### Speakers:

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<tr>
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<th>Affiliation</th>
<th>Topic</th>
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<tr>
<td>Carol Irvin</td>
<td>Abt Associate, Inc.</td>
<td>“Evaluation of the District of Columbia’s Demonstration Program: Managed Care System for Disabled and Special Needs Children”</td>
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<tr>
<td>Deborah Allen</td>
<td>Massachusetts Department of Public Health</td>
<td>“The Managed Care Enhancement Program for Children with Special Health Care Needs”</td>
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<tr>
<td>Barbara Staub</td>
<td>White Bear Lake Clinic</td>
<td>“Services for Children with Chronic Illness and Disease in an HMO”</td>
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**Harriette Fox and Margaret McManus**  
Maternal and Child Health Policy Research Center  
“State Medicaid Managed Care Policies Affecting Children”

### Reactors:

<table>
<thead>
<tr>
<th>Name</th>
<th>Affiliation</th>
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<tbody>
<tr>
<td>Ruth Stein</td>
<td>Albert Einstein College of Medicine</td>
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| 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 Boult  
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

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<tr>
<th>Moderator:</th>
<th>Robyn Stone</th>
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<th>Betty Jo Berland</th>
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<th>Nancy Miller</th>
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<th>Diane Rowland</th>
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<td>Kaiser Commission on the Future of Medicaid</td>
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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
<table>
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<tr>
<th>Speaker:</th>
<th>Paul R. Spitzer</th>
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**DINNER PRESENTATION**

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<th>Dark Side of the Loon</th>
<th>Thursday, November 21</th>
<th>7:00-9:00 pm</th>
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# 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  
“QI²: 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

<table>
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<tr>
<th>Keynote Address:</th>
<th>Bruce Vladeck</th>
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