

**A REPORT ON THE ACTUARIAL,
MARKETING, AND LEGAL ANALYSES
OF THE CLASS PROGRAM**

APPENDIX K:

EARLY MEETINGS WITH STAKEHOLDERS

Appendix K

Early Meetings with Stakeholders*

* - All meetings, unless otherwise noted, are general information on CLASS and were attended by Dr. Richard Frank, Deputy Assistant Secretary for Disability, Aging and Long-Term Care Policy in the Office of the Assistant Secretary for Planning and Evaluation (ASPE) at HHS and his staff

- September 3, 2009 with Connie Garner of Senate HELP
- September 8, 2009 with staff from Social Security Administration including Angela Arnett and Thomas Parrott and Meena Seshamani of the Office of Health Reform (OHR)
- September 14, 2009 with Ann Tumlinson of Avalere Health
- September 21, 2009 with the Lewin Group
- September 22, 2009 with the Lewin Group
- November 3, 2009 call with Judy Feder of Georgetown University
- December 16, 2009 Meeting with Bob Glover of the National Association of State Medicaid Directors
- December 17, 2009 Meeting with Gretchen Alkema of the Scan Foundation and Judy Feder
- December 21, 2009 Meeting with Robyn Stone of AAHSA
- January 5, 2010 Meeting with Nancy Thaler and Chas Moseley from the National Association of State Directors of Developmental Disabilities Services
- March 9, 2010 Meeting with Stephen Goss of SSA
- March 23, 2010 Meeting with Stephen Goss of SSA
- April 7, 2010 Meeting with Univita Health
- April 14, 2010 Meeting with the Public Sector CEO Association Meeting including Bob Glover and Meighan Haupt
- April 21, 2010 Meeting with Connie Garner of Senate HELP and Bruce King
- April 22, 2010 Meeting on Regulations on the CLASS Act with Cori Uccello of the American Academy of Actuaries
- May 4, 2010 Meeting with Janet Forlini of NCOA
- May 12, 2010 Meeting with Lee Goldberg of SEIU
- May 13, 2010 Meeting with National Association of Insurance Commissioners
- May 14, 2010 Meeting on CLASS and Medicaid with OGC
- May 17, 2010 Meeting with Karl Polzer of the National Center for Assisted Living in AHCA
- June 3, 2010 Meeting with Larry Rubin, Eric Trowbridge and Laura Cox Kaplan of Pricewaterhouse Cooper
- June 15, 2010 Meeting with Rhonda Richards of AARP
- June 23, 2010 Meeting with Marc Cohen of LifePlans Inc.
- June 25, 2010 Meeting on Cash Benefits under CLASS with Paul Van de Water with the Center on Budget and Policy Priorities
- June 25, 2010 Meeting with Kathy Greenlee (AoA) and Gretchen Alkema from SCAN Foundation

- June 30, 2010 Meeting with Jeremy Pincus of the Forbes Consulting Group
- June 30, 2010 Meeting with Pete Isberg with ADP (Automatic Data Processing Inc.)
- July 12, 2010 Meeting with Katie Maslow of the Alzheimer's Association
- July 15, 2010 Meeting on Administrative Expenses under the CLASS Program with John Wilkin from the Actuarial Research Corporation (ARC)
- July 20, 2010 Meeting with Gretchen Alkema from SCAN Foundation
- July 22, 2010 Meeting on the CLASS Model with John Wilkin from ARC
- August 13, 2010 Meeting to discuss the CLASS model with John Wilkin, Gordon Trapnell, Eddie Armentrout and Mike Sandler of ARC
- August 19, 2010 Meeting with Jay Greenberg from NCOA
- August 20, 2010 Meeting with Jim Firman from NCOA
- August 24, 2010 Meeting with Bruce Chernoff and Gretchen Alkema from SCAN Foundation
- September 2, 2010 Meeting with David Dranove from Northwestern University
- September 14, 2010 Meeting with Brian Burwell (Thomson Reuters) and Lina Walker of AARP
- September 22, 2010 CLASS Act Models Meeting (See Appendix N for more detail)
- September 28, 2010 Meeting with Jeremy Pincus of the Forbes Consulting Group
- October 5, 2010 Meeting on CLASS Model with John Wilkin (ARC)
- October 8, 2010 Meeting with Avalere Health including Ann Tumlinson and Elana Stair
- October 22, 2010 Meeting with David Dranove of Northwestern University
- October 26, 2010 Meeting with Peter Arno from New York Medical College
- November 3, 2010 Meeting with ARC staff on CLASS Model
- November 9, 2010 Meeting with Gretchen Alkema from the SCAN Foundation
- November 9, 2010 Meeting with Marc Cohen from LifePlans, Inc.
- November 17, 2010 Meeting with AARP including Alyson Burns, Susan Lutz, Milagros Lunaria and Rhonda Richards
- November 18, 2010 Meeting with Allison Siegwarth from Bazelon Center for Mental Health Law
- November 18, 2010 Meeting with Avalere Health including Anne Tumlinson, Eric Hammelman, Ng Weiwen and Elana Stair
- November 19, 2010 Meeting with Connie Garner from Senate HELP
- November 22, 2010 Interview on Bloomberg News with Peggy Collins
- November 23, 2010 Meeting with David Dranove of Northwestern University
- November 29, 2010 Meeting with Pete Isberg from ADP
- November 30, 2010 Meeting with David Dranove, Cory Capps and Lenore Daffny from Northwestern University
- December 3, 2010 Meeting with Connie Garner and AdvanceCLASS board members
- December 9, 2010 Speech at Long-Term Care Discussion Group (AHIP)
- December 9, 2010 Meeting with SCAN Foundation
- December 10, 2010 Meeting with ARC Staff
- December 15, 2010 Meeting on Avalere Health CLASS Model with Avalere Health staff
- January 3, 2011 Meeting with ARC Staff

- January 3, 2011 Meeting with Richard Johnson of Urban Institute
- January 6, 2011 Participated in Webinar on Adults Ages 50-64 and the ACA
- January 14, 2011 Meeting with Connie Garner and AdvanceCLASS board
- January 21, 2011 Meeting with ARC Staff
- January 28, 2011 Meeting with ARC Staff
- January 31, 2011 Meeting with Judy Feder
- February 3, 2011 Meeting with Connie Garner
- February 3, 2011 CLASS Briefing for Hill Staff (Rayburn 2122)
- February 4, 2011 CLASS Briefing for Hill Staff (Dirksen 211)
- February 8, 2011 Meeting with Avalere Health staff
- February 8, 2011 Meeting with Gretchen Alkema from SCAN Foundation
- February 10, 2011 CLASS models' Actuarial Meeting with Avalere Health and ARC staff
- February 16, 2011 Meeting with SCAN Foundation
- February 17, 2011 Interview with Robert Pear of the New York Times
- February 18, 2011 CLASS Briefing for Senator Durbin's staff (Hart 711)
- February 23, 2011 Meeting with SCAN Foundation
- March 4, 2011 CLASS Briefing for Senator Thune and Congressman Boustany's staff (Russell 493)

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For additional information, you may visit the DALTCP home page at http://aspe.hhs.gov/_/office_specific/daltcp.cfm or contact the office at HHS/ASPE/DALTCP, Room 424E, H.H. Humphrey Building, 200 Independence Avenue, SW, Washington, DC 20201. The e-mail address is: webmaster.DALTCP@hhs.gov.

Files Available for This Report

Main Report	[48 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/index.shtml http://aspe.hhs.gov/daltcp/reports/2011/class/index.pdf
APPENDIX A: Key Provisions of Title VIII of the ACA, Which Establishes the CLASS Program	[6 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appA.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appA.pdf
APPENDIX B: HHS Letters to Congress About Intent to Create Independent CLASS Office	[11 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appB.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appB.pdf
APPENDIX C: <u>Federal Register</u> Announcement Establishing CLASS Office	[2 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appC.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appC.pdf
APPENDIX D: CLASS Office Organizational Chart	[2 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appD.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appD.pdf
APPENDIX E: CLASS Process Flow Chart	[2 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appE.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appE.pdf
APPENDIX F: <u>Federal Register</u> Announcement for CLASS Independence Advisory Council	[3 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appF.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appF.pdf
APPENDIX G: Personal Care Attendants Workforce Advisory Panel and List of Members	[6 PDF pages]
Full Appendix	http://aspe.hhs.gov/daltcp/reports/2011/class/appG.htm http://aspe.hhs.gov/daltcp/reports/2011/class/appG.pdf
Ga: <u>Federal Register</u> Announcement for Personal Care Attendants Workforce Advisory Panel	http://aspe.hhs.gov/daltcp/reports/2011/class/appGa.pdf
Gb: Advisory Panel List of Members	http://aspe.hhs.gov/daltcp/reports/2011/class/appGb.pdf

APPENDIX H: Policy Papers Discussed by the LTC Work Group	[36 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appH.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appH.pdf
APPENDIX I: CLASS Administration Systems Analysis and RFI	[10 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appI.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appI.pdf
APPENDIX J: Additional Analyses for Early Policy Analysis	[150 PDF pages]
Full Appendix	http://aspe.hhs.gov/daltcp/reports/2011/class/appJ.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appJ.pdf
Ja: A Profile of Declined Long-Term Care Insurance Applicants	http://aspe.hhs.gov/daltcp/reports/2011/class/appJa.pdf
Jb: CLASS Program Benefit Triggers and Cognitive Impairment	http://aspe.hhs.gov/daltcp/reports/2011/class/appJb.pdf
Jc: Strategic Analysis of HHS Entry into the Long-Term Care Insurance Market	http://aspe.hhs.gov/daltcp/reports/2011/class/appJc.pdf
Jd: Managing a Cash Benefit Design in Long-Term Care Insurance	http://aspe.hhs.gov/daltcp/reports/2011/class/appJd.pdf
APPENDIX K: Early Meetings with Stakeholders	[4 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appK.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appK.pdf
APPENDIX L: In-Depth Description of ARC Model	[62 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appL.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appL.pdf
APPENDIX M: In-Depth Description of Avalere Health Model	[23 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appM.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appM.pdf
APPENDIX N: September 22, 2010 Technical Experts Meeting	[37 PDF pages]
Full Appendix	http://aspe.hhs.gov/daltcp/reports/2011/class/appN.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appN.pdf
Na: Agenda, List of Participants, and Speaker Bios	http://aspe.hhs.gov/daltcp/reports/2011/class/appNa.pdf
Nb: Presentation Entitled "Actuarial Research Corporation's Long Term Care Insurance Model"	http://aspe.hhs.gov/daltcp/reports/2011/class/appNb.pdf
Nc: Presentation Entitled "The Long-Term Care Policy Simulator Model"	http://aspe.hhs.gov/daltcp/reports/2011/class/appNc.pdf
Nd: Presentation Entitled "Comments on 'The Long-Term Care Policy Simulator Model'"	http://aspe.hhs.gov/daltcp/reports/2011/class/appNd.pdf
APPENDIX O: Actuarial Report on the Development of CLASS Benefit Plans	[47 PDF pages]
	http://aspe.hhs.gov/daltcp/reports/2011/class/appO.htm
	http://aspe.hhs.gov/daltcp/reports/2011/class/appO.pdf

APPENDIX P: June 22, 2011 Technical Experts Meeting
Full Appendix

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<http://aspe.hhs.gov/daltcp/reports/2011/class/appP.htm>

<http://aspe.hhs.gov/daltcp/reports/2011/class/appP.pdf>

Pa: Agenda and Discussion Issues and
Questions

<http://aspe.hhs.gov/daltcp/reports/2011/class/appPa.pdf>

Pb: Presentation Entitled “Core Assumptions and
Model Outputs”

<http://aspe.hhs.gov/daltcp/reports/2011/class/appPb.pdf>

Pc: Presentation Entitled “Actuarial Research
Corporation’s Long Term Care Insurance
Model”

<http://aspe.hhs.gov/daltcp/reports/2011/class/appPc.pdf>

Pd: Presentation Entitled “The Avalere Long-
Term Care Policy Simulator Model”

<http://aspe.hhs.gov/daltcp/reports/2011/class/appPd.pdf>

Pe: Presentation Entitled “Alternative Approaches
to CLASS Benefit Design: The CLASS
Partnership”

<http://aspe.hhs.gov/daltcp/reports/2011/class/appPe.pdf>

APPENDIX Q: Table 2: Actuarial and Demographic Assumptions

[2 PDF pages]

<http://aspe.hhs.gov/daltcp/reports/2011/class/appQ.htm>

<http://aspe.hhs.gov/daltcp/reports/2011/class/appQ.pdf>

APPENDIX R: Figure 1: Daily Benefit Amount for Increased Benefit

[2 PDF pages]

<http://aspe.hhs.gov/daltcp/reports/2011/class/appR.htm>

<http://aspe.hhs.gov/daltcp/reports/2011/class/appR.pdf>