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Jean Accius

Vice President

Long-Term Services & Supports and Livable Communities Group
AARP Public Policy Institute

Dr. Jean Accius is a nationally recognized thought leader in aging, health policy, livable communities and long-term services and supports (LTSS) reform. He is Vice President of the Long-Term Services & Supports and Livable Communities Group within the AARP Public Policy Institute. In this role, he provides strategic direction, thought leadership and technical expertise to create and drive innovative policy solutions that raise awareness, foster meaningful dialogue and spark action to improve the lives of millions of older adults and the families who support them.

Dr. Accius brings deep knowledge and a wealth of experience having served in positions across the private, public and nonprofit sectors to advance the issues and interests of older adults. At the state level, he served as a Senior Program Officer within the Florida Department of Elder Affairs for the Ambassadors for Aging program. Under his leadership, he developed innovative tools that raised awareness and sparked discussions regarding the social, economic and political **contributions of older Floridians to address the state's fiscal and social** challenges. At the federal level, he worked as a Senior Policy Advisor within the Disabled and Elderly Health Programs Group at the Centers for Medicare & Medicaid Services (Department of Health & Human Services). In that role, he directed, implemented, and monitored multimillion-dollar grant programs and projects designed to support and improve the delivery of LTSS.

Dr. Accius has authored numerous reports, articles and blogs that have garnered immense attention from the policy community, practitioners in the field and the media. In 2017, the National Academy of Social Insurance recognized Dr. Accius as one of the new generation of social insurance leaders in the country. In 2015, The Daily Record recognized him as one of the top professionals under the age of 40 for his professional accomplishments and commitment to inspiring change in the community in the State of Maryland. He was also the 2015 recipient of the American University Black Alumni award for his work and service

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to the community. Dr. Accius has been quoted by or appeared in numerous media outlets, including Politico, Reuters, Next Avenue, **ESPN's The Undeclared, Congressional Quarterly's online arm and the Huffington Post.**

He serves on a variety of boards and advisory committees including Justice in Aging, the American Society on Aging, Leadership Maryland, the Florida State University Alumni Association. He also serves on the Editorial Advisory Committee for Generations, the journal for the American Society on Aging, and the Mission and Population Board Committee of the Holy Cross Health hospital system.

Dr. Accius is an Executive Leadership Council Fellow and holds a **bachelor's degree in hospitality administration and a master's degree in aging studies** from the Pepper Institute on Aging and Public Policy at Florida State University, and a Ph.D. in public administration from American University.

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Sandy Atkins
Vice President
Strategic Initiatives
Partners in Care Foundation

Sandy has worked at Partners for 13 years. She is the key contact for **Partners' nationally-**recognized HomeMedsSM program, and works closely with **Partners' CEO, June Simmons, to provide strategic guidance to the organization.** Prior to joining Partners as Executive Director of Hospice of Pasadena, **Sandy was Program Director of USC's Center for Long-Term Care Integration.** Working with Bob Kane in Minnesota, she directed the STARS project to assist small rural towns in their efforts to deal with increasing numbers of elders wishing to age in place. After six years working in international development, Sandy spent 15 years as administrator for three continuing care retirement communities.

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Connie Benton Wolfe

President & CEO

Aging & In-Home Services of NE Indiana /
Preferred Community Health Partners, LLC

Connie Benton Wolfe, MA, is the President & CEO of Aging and In-Home Services of Northeast Indiana (AIHS), a designed Area Agency on Aging (AAA) and Aging & Disability Resource Center (ADRC) providing planning, access and support services for older adults, individuals with disabilities and their family caregivers. She is also the President & CEO of Preferred Community Health Partners, LLC, a subsidiary of Aging & In-Home Services dedicated to creating integrated care partnerships with health care. Benton Wolfe is currently Chairperson of the Indiana Aging Alliance LLC, an arm of the Indiana Area Agency on Aging Association and has been instrumental in both securing and executing statewide contracts with managed care organizations.

Benton Wolfe's current professional focus is on developing the organizational capacity and health IT platform required to position her own agency and the aging network to successfully secure contracts with managed care and other medical payers. She is committed to attaining quality standards for long term services and supports and believes that the aging network is perfectly poised to be the national leader, and integrated care partner, to effectively address the social determinants of health for complex patients to improve health outcomes and reduce healthcare costs.

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Antonia Bernhardt

Presidential Management Fellow
U.S. Department of Veterans Affairs

Antonia Bernhardt worked with the Altarum Institute's Center for Elder Care and Advanced Illness in 2014. She is currently a Presidential Management Fellow with the Geriatrics, Palliative and Extended Care Service at the San Francisco VA Health Care System. Ms. Bernhardt earned her master's degree in public policy from the University of Chicago and her bachelor's degree in public health from Johns Hopkins University.

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Kenneth M. Genewick

Director

Niagara County Office for the Aging

Ken has been the Director of the Niagara County Office for the Aging for the past six **years, leading his organization's mission to promote** independence and quality of life through directly and collaboratively provided community-based services to older adults and caregivers living in Niagara County.

Ken's diverse private and public sector professional health and long term care experience and education background, including a Master of Business Administration degree with a concentration in Health Systems Administration from the University at Buffalo, allows him to bring a unique perspective on aging, and its dual impact on both the system and individual.

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Vicki Gottlich

Director

Center for Policy and Evaluation
Administration for Community Living

As the Director of the Center for Policy and Evaluation (CPE), Vicki Gottlich oversees the coordination of effort across ACL program offices to manage the evaluation of, and reporting on, the performance of ACL programs; the provision of technical assistance on performance **measurement to ACL grantees; and assisting ACL's organizational units** in developing operational plans that include measurable objectives and performance indicators.

Prior to serving as the Director of CPE, Ms. Gottlich served as a senior advisor to Sharon Lewis, Principal Deputy Administrator (ACL), focusing on policy issues involving health insurance and Long-Term Social Services (LTSS). Ms. Gottlich came to ACL from the Centers for Consumer Information and Insurance Oversight (CCIIO) in the Center for Medicare and Medicaid Services (CMS), where she headed the Consumer Support Group (CSG). CSG certified assistance counselor programs for the private Marketplaces; implemented and oversaw external appeals procedures; and implemented and oversaw the summary of benefits and coverage, which provides consumers with standardized information about private health insurance plans.

Before joining HHS in 2011, Ms. Gottlich worked as an attorney and beneficiary advocate for older people and people with disabilities, engaging in policy work, litigation, and administrative advocacy. She focused on issues related to Medicare, Medicaid, private insurance, LTSS, adult guardianship and end-of-life decision making. Ms. Gottlich is the author of numerous articles regarding Medicare, the Affordable Care Act, and private health insurance.

Ms. Gottlich has a Juris Doctor degree from New York University and a Master of Laws in urban legal studies from George Washington University Law School.

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Robert Jenkens

Senior Vice President and Director of Social Impact Initiatives
National Cooperative Bank

Mr. Robert Jenkens has been Senior Vice President and Director of Social Impact Initiatives at National Consumer Cooperative Bank since March 6, 2013. Mr. Jenkens served as the Managing Director of aging and independence for NCB Capital Impact, NCB's nonprofit strategic partner. He is involved in the bank's cooperative and community development strategy, focusing on health care, senior living, nonprofits, co-op and community development.

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Karen Kali

Operations Specialist

National Community Reinvestment Coalition

Karen is the Operations Specialist for NCRC. Karen holds a masters in Community and Regional Planning and a bachelor degree in Sociology.

Karen's career has focused on affordable housing and community development since 2001. Prior work experience includes positions with Sage Computing, NCB Capital Impact, the American Planning Association and the Center for Community Change. In addition, she was **Program Manager for NCRC's National Neighbors Silver campaign.** Karen is a certified urban planner by the American Institute of Certified Planners.

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Mary Lazare

Principal Deputy Administrator
Administration for Community Living

President Trump appointed Mary Lazare **to serve as ACL's Principal Deputy Administrator** on June 19, 2017.

Ms. Lazare comes to ACL from St. Louis, Missouri, where she most recently served as Vice President for Home- and Community-Based **Services for Lutheran Senior Services. With master's degrees** in both management and gerontology and an extensive career in long-term care and community health operations, she combines hands-on program-level knowledge with strategic planning and organizational development expertise, and has led organizations in delivering quality services and advocating for the people they serve while adhering to sound stewardship principles.

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Jim Lee

Vice President and Director
Systems Research & Initiatives Group
Altarum

Jim Lee has been with Altarum for more than 20 years. Before his **current position, he served as Director of Altarum's Medical Care Systems Group**, where he led public health informatics and health quality research programs.

Mr. Lee's most recent work focuses on health technology assessments drawing on administrative, financial accounting, and clinical data to support clinical trials, practice guideline development, and program evaluations.

His recent studies include evaluation of the cost-effectiveness of alternative diagnostics in lung, breast, and cervical cancer; rapid identification and intervention in severe sepsis; and HIV viral load surveillance protocols.

Mr. Lee earned his undergraduate and graduate degrees in engineering and applied mathematics from Northwestern University and the University of Michigan, respectively.

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Karen Leekity

Zuni Elderly Services Director
Pueblo of Zuni's LTSS Network

Oversee all the Elderly Services Programs under one umbrella in Pueblo of Zuni, New Mexico. Attended University of New Mexico, acquired degree in Business Administration, BBA in 2000. Graduated as Certified Public Manager from USDA Graduate School-Washington D.C. in 2005. Graduated from the National Center for Long-Term Care Business Strategy at Scripps Gerontology Center- Miami University in 2007. Has been with the Zuni Elder Programs for 27 years serving in various capacities since 1990. Developed home and community based programs for Elders in our Pueblo. Started the Zuni Adult Day Care program in 1998, facility was licensed by State of New Mexico Health Department in 2005. Had the privilege of working closely with Administration for Community Living (ACL) /Administration on Aging (AoA) and New Mexico Aging and Long Term Services Department (NM ALTSD) since starting work for the Zuni Tribe in 1990.

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Sandy Markwood

CEO

National Association of Area Agencies on Aging

Chief Executive Officer Sandy Markwood has more than 30 years experience in the development and delivery of aging, health, human services, housing and transportation programs in counties and cities across the nation. Prior to coming to n4a in January 2002, Sandy served as the Deputy Director of County Services at the National Association of Counties where she took a lead role in research, training, conference planning, program development, technical assistance and grants management.

As CEO, Sandy is responsible for n4a's overall management. She sets strategic direction for the staff, oversees the implementation of all policy, grassroots advocacy, membership and program initiatives. She **also leads n4a's fundraising efforts and engages corporate sponsors to** support critical initiatives, including an aging awards/best practices program and the Leadership Institute for Area Agency on Aging staff. Externally, Sandy forms strategic partnerships with federal agencies and organizations in aging, human services and health care arenas to enhance the role and recognition of Area Agencies on Aging and Title VI programs.

Sandy holds Bachelor's and Master's degrees from the University of Virginia.

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Anne Montgomery

Deputy Director
Center for Elder Care and Advanced Illness
Altarum

Anne Montgomery is the **Deputy Director for Altarum's Center for Elder Care and Advanced Illness** and a visiting scholar at the National Academy of Social Insurance.

From 2007 to 2013, Ms. Montgomery served as senior policy advisor for the U.S. Senate Special Committee on Aging, where she was responsible for developing hearings and legislation to improve nursing homes and home and community-based services in Medicaid, dually eligible beneficiaries, health care workforce issues, elder abuse, dementia care, and community and social support services for older adults. She has also served as a senior health policy associate with the Alliance for Health Reform in Washington, DC; a senior analyst in public health at the U.S. Government Accountability Office; and a legislative aide for the Ways & Means Health Subcommittee.

Based in London as an Atlantic fellow in public policy in 2001–2002, Ms. Montgomery undertook comparative policy analysis of the role of family caregivers in the development of long-term care in the United Kingdom and the United States. During the 1990s, she worked as a health and science journalist covering the National Institutes of Health and Congress.

A member of the National Academy of Social Insurance and Academy Health, Ms. Montgomery has an M.S. in journalism from Columbia University and a B.A. in English literature from the University of Virginia and has taken gerontology coursework at The Johns Hopkins University.

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Mike Nardone

Director of the Disabled and Elderly Health Programs Group
Center for Medicaid and CHIP Services

Mike Nardone joined the Center for Medicaid and CHIP Services (CMCS) as Director of the Disabled and Elderly Health Programs Group (DEHPG) in January 2016. **Mike has more than 30 years' experience in health and human services, having held positions at the state, local, and national levels.** Mike comes to the agency from working as a Managing Principal at Health Management Associates (HMA) where, as founding member of the Harrisburg office, he led a series of projects focused on state efforts to improve systems of care for Medicaid consumers.

Prior to his role at HMA, Mike served as acting secretary of the Pennsylvania Department of Public Welfare, a \$27-billion, 17,000-**employee department with responsibility for the state's major health and human services programs, including Medical Assistance.** He also previously served as deputy secretary of the state's Medicaid program, **working to advance the state's managed care and managed fee for service delivery systems to better serve Pennsylvania's more than 2 million Medicaid beneficiaries.** As Medicaid Director, Mike also served as an elected member of the executive committee of the National Association of Medicaid Directors and was a Robert Wood Johnson Foundation Medicaid Leadership Institute Fellow. Earlier in his tenure in Pennsylvania government, Mike served as Executive Director of the **Governor's Long Term Living Council, a cabinet-level group charged with rebalancing the state's long-term care system to increase the use of home and community based services for consumers of long term services and supports.**

Mike also has extensive experience in the housing policy arena, having **led the City of Philadelphia's homeless services system as Deputy Managing Director for Special Needs Housing.** He also previously has held government relations positions in Federal and State health policy, having played a lead role for the Commonwealth of Massachusetts and as Associate Executive Vice President for Government Relations at the **University of Pennsylvania Health System. Mike holds a master's degree**

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in Public Affairs from the Woodrow Wilson School of Princeton University, and is a Phi Beta Kappa graduate of Haverford College.

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Marisa Scala-Foley

Team Lead for Business Acumen and Health Information Technology
Administration for Community Living

Marisa Scala-Foley is a Social Science Analyst and Team Lead for Business Acumen and Health Information Technology (HIT) in the Office of Integrated Care Innovations in the Center for Integrated Programs at the U.S. Administration for Community Living (ACL). At ACL she **manages the agency's efforts to build the business capacity of state and** community-based organizations to partner and contract with integrated care entities such as health plans, accountable care organizations, health systems, and more. She also identifies and analyzes emerging policy issues and trends related to health care, aging, and disability; advances innovative program strategies; and provides training and technical assistance related to the Affordable Care Act. Prior to joining ACL, she served as Director of the National Center for Benefits Outreach and Enrollment at the National Council on Aging, and has worked her entire career in the field of aging on issues related to developing accessible educational materials and infrastructure for health-care and long-term care education (for consumers and professionals), consumer navigation of the U.S. health-care and long-term care systems, and consumer direction in long-term care for older adults.

Marisa holds a Masters in Gerontological Studies from Miami University **(Ohio), and a Bachelor's degree in Sociology/Gerontology from the** College of the Holy Cross in Worcester, MA. She lives in Alexandria, VA with her husband and two sons.

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Brenda Schmitthenner

Senior Director
Successful Aging
Gary and Mary West Health Institute

As Senior Director, Successful Aging, Brenda Schmitthenner, MPA **brings more than 30 years of experience to advance West Health's** mission to enable seniors to successfully age, living life on their own terms with access to high-quality health and support services that preserve and protect their dignity, quality of life and independence.

Schmitthenner has extensive knowledge and experience with older adults and persons with disabilities in healthcare and community settings, and a proven track record—both locally and nationally—of outstanding leadership, program development and implementation. In her current role at West Health, she leads a team that is collaborating with community-based organizations and healthcare providers to improve the coordination of health and support services across the care continuum for seniors.

Prior to joining West Health in 2016, Ms. Schmitthenner served as the **Aging Program Administrator for the County of San Diego's Aging and Independence Services (AIS)**, where she spent more than 15 years working with some of the most innovative leaders in the county committed to ensuring the health, safety and well-being of all San Diegans.

Schmitthenner was the administrator for the largest Community-Based Care Transitions Program (CCTP) in the country and managed over \$20 million in aging grants, including the SCAN Foundation Regional Coalition Grant, the Tech4Impact Grant, the Administration on Community Living Business Acumen Technical Assistance Award and the NCQA Care Coordination Standards Pilot. She also brings extensive experience as a policy advisor for national, statewide and local system integration and improved care coordination initiatives, and over 20 years

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of practice as a Geriatric Case Manager, Hospice and Skilled Nursing Facility Social Worker.

Schmitthenner holds an M.P.A. from National University and earned her B.A from Pennsylvania State University.

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Sarah Slocum

Health Policy Analyst
Altarum

Ms. Slocum joined Altarum's Center for Elder Care and Advanced Illness (CECAI) in the fall of 2016. At CECAI, Ms. Slocum strives to improve the quality of life and care for frail elders living with disability. Just prior, she **served 13 years as Michigan's State Long Term Care Ombudsman**, leading advocacy for Michigan citizens living in long term care facilities.

She has led policy change efforts in the state Medicaid program, long term care regulations, the Certificate of Need program, and with the Michigan legislature. Ms. Slocum has testified on nursing home quality before the U.S. Senate Special Committee on Aging and has been a board member of the National Consumer Voice for Quality Long Term Care as well as a board member of the National Association of State Long Term Care Ombudsman Programs.

Her work has included passage of the first elder abuse laws in Michigan **and participating in the development of Michigan's pilot project for Integrated Care for the Dually Eligible populations**. She has been a leading member of the Michigan Olmstead Coalition.

From 2001 to 2003 she worked at Michigan AARP on long term care policy issues. From 1994 to 2001, she directed the Medicare/Medicaid **Assistance Program (MMAP), Michigan's federally-funded State Health Insurance Counseling and Assistance Program (SHIP)**. She led more than 300 volunteer counselors at 45 sites around the state providing Medicare, Medicaid, and insurance training and policy updates. Her MMAP experience followed work as an Assistant Ombudsman and as a VISTA volunteer working on eldercare issues.

Ms. Slocum has an MA in Bioethics from the Michigan State University College of Human Medicine.

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Abigail Suarez

Business Development Officer
Capital Impact Partners

Mrs. Suarez develops and implements strategies to originate loans in the marketplace. She co-**leads Capital Impact's business development** efforts nationwide, with a focus on expanding investments and partnerships in the East Coast. Mrs. Suarez has more than 10 years of experience in mission-driven lending and community development. She has a successful track record of aligning needs and capital for investments in pioneering initiatives and projects that improve the quality of life for low-income communities across the United States. Most recently, Mrs. Suarez is responsible for the deployment of **Age Strong™, a \$70 million investment fund created in partnership with AARP, the AARP Foundation, and the Calvert Foundation, with a focus on supporting organizations that are providing services to the nation's** low-income population who are 50 and older. During the first three years, Age Strong has deployed over \$53 million investments nationwide. Mrs. Suarez holds an MBA from the University of Virginia, **Darden School of Business, and a Bachelor's degree in Finance from St. Edwards University.**