

BRENDA C. SPILLMAN

Senior Fellow
Health Policy Center
The Urban Institute

Education

1989	Ph.D., Economics, The Maxwell School, Syracuse University
1982	M.A., Economics, University of Missouri-Kansas City
1972	B.A., English, University of Texas at Austin

Career Brief

Dr. Spillman, a health economist and senior fellow at the Urban Institute, has nearly 30 years' experience designing and conducting health and healthcare-related research projects. She is a nationally recognized expert on old-age disability, long term care use and financing, informal caregiving, and projections of service use and cost for the Medicare elderly, including those dually eligible for Medicaid. Recent work also has focused on chronic disease and promoting maximum health and functioning, including primary disease prevention and improved disease management. She is principal investigator for the long-term evaluation of Section 2703 Medicaid Health Homes, an initiative intended improve outcomes for beneficiaries with multiple chronic conditions by integrating delivery of health, behavioral, and supportive services. Dr. Spillman continued an earlier focus on the nonelderly uninsured, Medicaid, Medicare, and the impact of financing on acute health care utilization at UI, with studies on the effect of state policies on insurance, access, and utilization of services by low-income adults as part of UI's Assessing the New Federalism Project. She has extensive experience in use of a broad range of complex national surveys, Medicare and Medicaid administrative data, and assessment data and expertise in survey design. She is a co-investigator and leadership team member for the National Health and Aging Trends Study (NHATS), a national longitudinal survey of the Medicare elderly funded by the National Institute on Aging, and the companion National Study of Caregiving. Before joining UI in 1998, she was a research fellow at what is now the Agency for Healthcare Research and Quality.

Professional Background

2008-present	Senior Fellow, Health Policy Center, The Urban Institute
1998-2008	Senior Research Associate, Health Policy Center, The Urban Institute
1987-1998	Researcher, Agency for Health Care Policy and Research (now Agency for Healthcare Research and Quality), Center for Cost and Financing Studies, Long Term Care Studies

- 1985-1986 Dissertation Fellowship in Economics, The Maxwell School, Syracuse University
- Research assistant, Utah Medicaid case management analysis, principal investigators, Drs. Steven H. Long and Russell F. Settle
- 1982-1985 Research assistant, Economics Department, The Maxwell School, principal supervisor, Dr. Long
- 1981-1982 Teaching assistant, Economics Department, University of Missouri at Kansas City
- 1978-1981 Reporter, *The Kansas City Star*, Kansas City, MO
- 1972-1978 Reporter, editor, *The Arkansas Gazette*, Little Rock, AR

Publications and Reports

“Disability-Free Life Expectancy Over 30 Years: A Growing Female Disadvantage in the US Population,” with VA Freedman and DA Wolf, *Am J Public Health*. Published online ahead of print March 17, 2016: e1–e7. doi:10.2105/AJPH.2016.303089

“A National Profile of Family and Unpaid Caregivers Who Assist Older Adults with Health Care Activities,” with J Wolff, VA Freedman, and JD Kasper, *JAMA Internal Medicine* 2016 Mar 1;176(3):372-9. doi: 10.1001/jamainternmed.2015.7664.

“The Disproportionate Impact of Dementia on Family and Unpaid Caregiving to Older Adults,” with JD Kasper, VA Freedman, and JL Wolff, *Health Affairs* October 2015; 34:1642-1649; doi:10.1377/hlthaff.2015.0536

“Help for Family Caregivers Available from Government Programs and Policies,” with Pamela Doty. In *Family Caregiving in the New Normal*, Joseph Gaugler and Robert Kane, eds. Elsevier Academic Press, 2015.

“Disability Trajectories at the End of Life: A ‘Countdown’ Model” with DA Wolf, VA Freedman, JI Ondrich, and CL Seplaki, in press, *The Journals of Gerontology Series B: Psychological Sciences and Social Sciences* 2015 Sep; 70(5):745-52. doi: 10.1093/geronb/gbu182.

“Why Do Elders Receiving Informal Home Care Transition to Long Stay Nursing Home Residency?” Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, December 2014. <http://aspe.hhs.gov/sites/default/files/pdf/136256/LSNHU.pdf>

“The Residential Continuum From Home to Nursing Home: Size, Characteristics and Unmet Needs of Older Adults,” with VA Freedman, *Journal of Gerontology: Social Sciences*, 2014, 69 Suppl 1:S42-50. doi: 10.1093/geronb/gbu120.

“Older Adults Receiving Health Care Assistance and Their Family Caregivers: Prevalence, Characteristics, and Hours of Care,” with Jennifer Wolff. *Journal of Gerontology: Social Sciences*, 2014, 69 Suppl 1:S65-72. doi: 10.1093/geronb/gbu119.

“Disability and Care Needs of Older Americans,” with VA Freedman. *The Milbank Quarterly*, 92(3): 509-541, published online in advance of print, September 2014: DOI10.1111_1468-0009.12076.

“Rates and Timing of Medicaid Enrollment among Older Americans.” With TA Waidmann. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, June 2014.
<http://aspe.hhs.gov/pdf-report/rates-and-timing-medicaid-enrollment-among-older-americans>

Evaluation of the Medicaid Health Home Option for Beneficiaries with Chronic Conditions: Annual Report - Year Two, with Elizabeth Richardson, Anna Spencer, and Eva Allen. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, June 2014. (Individual reports for 11 states included and available as separate documents at links provided at the end of the report.)
<http://aspe.hhs.gov/daltcp/reports/2014/HHOption2.pdf>.

Disability and Care Needs of Older Americans by Dementia Status: An Analysis of the 2011 National Health and Aging Trends Study, with J Kasper and V Freedman. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, April 2014.
<http://aspe.hhs.gov/daltcp/reports/2014/NHATS-DS.pdf>

Informal Caregiving for Older Americans: An Analysis of the 2011 National Study of Caregiving, with J Wolff, V Freedman, and J Kasper. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, April 2014. <http://aspe.hhs.gov/daltcp/reports/2014/NHATS-IC.pdf>

Health Homes in Medicaid: The Promise and the Challenge, with B Ormond, E Richardson, and Judy Feder. Urban Institute Research Brief, February 2014.
<http://www.urban.org/UploadedPDF/413032-Health-Homes-in-Medicaid-The-Promise-and-the-Challenge.pdf>

“Hours of Care in Rounds 1 and 2 of the National Health and Aging Trends Study,” with VA Freedman and JD Kasper, April 2014. NHATS Technical Paper #7. Baltimore: Johns Hopkins University School of Public Health. Available at www.NHATS.org.

Updated Analyses of Trends in Use of Assistive Devices. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, January 2014.
<http://aspe.hhs.gov/daltcp/reports/2014/astdevup.pdf>

“Behavioral Adaptation and Late-Life Disability: A New Spectrum for Assessing Public Health Impacts,” with VA Freedman, JD Kasper, EM Agree, V Mor, RB Wallace, and DA Wolf, 2013, *American Journal of Public Health* 104:e88-e94.

Disability and Care Needs of Older Americans: An Analysis of the 2011 National Health and Aging Trends Study, with VA Freedman. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, October 2013.

Classification of Persons by Dementia Status in the National Health and Aging Trends Study. Technical Paper #5, with JD Kasper and VA Freedman. Baltimore: Johns Hopkins University School of Public Health, July 2013. Available at www.NHATS.org.

“Trends in Late-Life Activity Limitations: An Update from 5 National Surveys,” with VA Freedman, JC. Cornman, EM Crimmins, E Kramarow, J Lubitz, LG Martin, SS Merkin, RF Schoeni, TE Seeman, and TA Waidmann. *Demography*, 2013, DOI:10.1007/s13524-012-0167-z.

"Reliability and Validity of Self-Care and Mobility Accommodations Measures in the National Health and Aging Trends Study," with VA Freedman, EM Agree, J Cornman, and JD Kasper. *The Gerontologist*, August 2013.

Evaluation of the Medicaid Health Home Option for Beneficiaries with Chronic Conditions: Final Annual Report - Base Year, with BA Ormond and E Richardson. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, December 2012. <http://aspe.hhs.gov/daltcp/reports/2012/HHOption.pdf>

Medicaid Health Homes in Oregon: Review of Pre-Existing State Initiatives and State Plan Amendments for the State’s First Section 2703 Medicaid Health Homes, with BA Ormond and E Richardson. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, September 2012. <http://aspe.hhs.gov/daltcp/reports/2012/HHOption-MO.pdf>

Medicaid Health Homes in New York: Review of Pre-Existing State Initiatives and State Plan Amendments for the State’s First Section 2703 Medicaid Health Homes, with BA Ormond and E Richardson. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, August 2012. <http://aspe.hhs.gov/daltcp/reports/2012/HHOption-NY.pdf>

Medicaid Health Homes in Missouri: Review of Pre-Existing State Initiatives and State Plan Amendments for the State’s First Section 2703 Medicaid Health Homes, with BA Ormond and E Richardson. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, June 2012. <http://aspe.hhs.gov/daltcp/reports/2012/HHOption-MO.pdf>

Medicaid Health Homes in Rhode Island: Review of Pre-Existing State Initiatives and State Plan Amendments for the State’s First Section 2703 Medicaid Health Homes, with BA Ormond and E

Richardson. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, June 2012. <http://aspe.hhs.gov/daltcp/reports/2012/HHOption-RI.pdf>

Montaquila J, Freedman VA, Spillman B, Kasper JD, "Development of Round 1 Survey Weights," NHATS Technical Paper #2, Johns Hopkins University School of Public Health, 2012. <http://www.nhats.org/scripts/TechnicalWeighting.htm>

"Potential Savings through Prevention of Avoidable Chronic Illness among CalPERS State Active Members," with TA Waidmann and BA Ormond, Urban Institute Research Report, April 2012. <http://www.urban.org/publications/412550.html>

"Housing as a Platform for Improving Outcomes for Older Renters," with J Biess and G MacDonald, What Works Collaborative: Field-building Research Agendas, April 2012. <http://www.urban.org/publications/412553.html>

"Financial Preparedness for Long-Term Care Needs in Old Age." In *Consumer Knowledge and Financial Decisions*, DJ Lamdin, ed., New York, NY: Springer, 2012.

"Validation of New Measures of Disability and Functioning in the National Health and Aging Trends Study," with VA Freedman, JD Kasper, J Cornman, E Agree, K Bandeen-Roche, V Mor, R Wallace, and DA Wolf. *Journals of Gerontology: Medical Sciences*, published online in advance of print, July 2011.

"Modeling Strategy: Health Care Savings from Reduced Smoking," with BA Ormond and TA Waidmann, Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Science and Data Policy, January 2011.

"Lifetime Risk and Duration of Chronic Disease and Disability," with CM Murtaugh and X Wang. *Journal of Aging and Health* 23(3) 554–577, April 2011, published online December 7, 2010.

"Potential National and State Health Care Savings from Primary Prevention," with BA Ormond, TA Waidmann, KJ Caswell, and B Tereshchenko. *American Journal of Public Health* 101: 157-164, January 2011, published online November 18, 2010.

"Does High Caregiver Stress Predict Nursing Home Entry?" with SK Long. *Inquiry* 46(2):140-161.

"The Impact of Obesity on Mortality, Morbidity, Disability, and Medicare Costs among the Elderly." Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, May 2009.

"Long-Term Care Utilization Patterns among New Yorkers who Fail Medical Underwriting to Purchase Partnership Policies," with CM Murtaugh. Report to the New York State Partnership for Long-Term Care, August 2008.

"Simulation Modeling on a Life Care Annuity," with CM Murtaugh. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of

Disability, Aging, and Long-Term Care Policy, August 2007.

<http://aspe.hhs.gov/daltcp/reports/2007/annuity.pdf>

“Consumer Preparedness for Long-Term Care: Personal Financing Options for Long Term Care,” Monograph prepared for Building Bridges: Making a Difference in Long Term Care, AcademyHealth adjunct meeting, June 2007.

“Does High Caregiver Stress Lead to Nursing Home Entry?” with SK Long. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, April 2007.

<http://aspe.hhs.gov/daltcp/reports/2007/NHentry.pdf>

“Beyond Cash and Counseling: The Second Generation of Individual Budget-based Community Long-Term Care Programs,” with K Black and BA Ormond. Kaiser Commission on Medicaid and the Uninsured Publication Number 7579, January 2007.

<http://www.kff.org/medicaid/upload/7579.pdf>

“Promoting Decline in Late-Life Disability Prevalence: Comparisons of Three Potentially High-Impact Interventions,” with VA Freedman, N Hodgson, J Lynn, TA Waidmann, A Wilkinson, and DA Wolf. *The Milbank Quarterly* 84(3):493-520, September 2006.

“A Framework For Identifying High-Impact Interventions To Promote Reductions In Late-Life Disability” with VA Freedman, N Hodgson, J Lynn, TA Waidmann, A Wilkinson, DA Wolf. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, September 2006.

<http://aspe.hhs.gov/daltcp/reports/2006/prodecl.pdf>

“Beyond Cash and Counseling: An Inventory of Individual Budget-based Community Long-Term Care Programs,” with K Black and BA Ormond. Kaiser Commission on Medicaid and the Uninsured Issue Brief 7485, April 2006. <http://www.kff.org/medicaid/7485.cfm>

“The Size and Characteristics of the Residential Care Population: Evidence from Three National Surveys,” with K Black. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, January 2006. <http://aspe.hhs.gov/daltcp/reports/2006/3natlsur.pdf>

“Staying the Course: Trends in Family Caregiving,” with K Black. AARP Public Policy Institute Issue Paper #2005-17, November 2005. Report:

http://assets.aarp.org/rgcenter/il/2005_17_caregiving.pdf; Issue Brief:

http://assets.aarp.org/rgcenter/il/inb107_caregiving.pdf

“The Impact of Disability Trends on Medicare Spending.” Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, September 2005.

<http://aspe.hhs.gov/daltcp/reports/distrnd.pdf>

“Assistive Device Use among the Elderly: Trends, Characteristics of Users, and Implications for Modeling.” Report to the Department of Health and Human Services, Assistant Secretary for

Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, September 2005. <http://aspe.hhs.gov/daltcp/reports/astdev.pdf>

“Analyses of Informal Caregiving: Evidence from the Informal Caregiving Supplement to the 1999 National Long-Term Care Survey: Results from the Technical Expert Panel and Recommendations,” with K Black. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, May 2005.

“The Size of the Long-Term Care Population in Residential Care: A Review of Estimates and Methodology,” with K Black. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, February 28, 2005. <http://aspe.hhs.gov/daltcp/reports/ltcpopsz.pdf>

“Examining Long-Term Care Episodes and Care History for Medicare Beneficiaries: Analytic Framework and Analysis Plan,” with S Maxwell, TA Waidmann, K Liu, P Aliaga, and B Overington. Final Report to the Center for Medicare and Medicaid Services, October 2004. https://www.cms.hhs.gov/Reports/downloads/Maxwell_2004_3.pdf.

“Resolving Inconsistencies in Old-Age Disability Trends: Report from a Technical Working Group,” with VA Freedman, E Crimmins, RF Schoeni, et al. *Demography* 41(3):417-441, August 2004.

"Changes in Elderly Disability Rates and the Implications for Health Care Utilization and Cost." *The Milbank Quarterly* 82(1), March 2004.

“Does the Health Care Safety Net Narrow the Access Gap?” with S Zuckerman and B Garrett. ANF Discussion Paper series, April 2003. <http://www.urban.org/url.cfm?ID=310668>

“Policy Implications of an Annuity Approach to Integrating Long Term Care Financing and Retirement Income,” with CM Murtaugh and MJ Warshawsky, *Journal of Aging and Health* 15(1), February 2003.

"Trends in Residential Long Term Care: Use of Nursing Homes and Assisted Living and Characteristics of Facilities and Residents," with K Liu and C McGilliard. Report to the Department of Health and Human Services, Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy; November 2002. (<http://aspe.hhs.gov/daltcp/reports/rltct.pdf>).

“New Estimates of Lifetime Nursing Home Use: Have Patterns of Use Changed?” with J Lubitz. *Medical Care* 40(10):965-975, March 2002.

"Health Care Access for Uninsured Adults: A Strong Safety Net Is Not the Same as Insurance." The Urban Institute: Washington, DC Assessing the New Federalism Policy Brief B-42, January 2002. (http://www.urban.org/UploadedPDF/310414_anf_b42.pdf)

“Integration of the Life Annuity and Long-term Care Insurance: Theory, Evidence, Practice, and Policy,” with MJ Warshawsky and CM Murtaugh. In *Innovations in Financing Retirement*, OS Mitchell, Z Bodie, B Hammond, and S Zeldes, eds., University of Pennsylvania Press, 2002.

“In Sickness and in Health: An Annuity Approach to Financing Long-term Care and Retirement Income,” with CM Murtaugh and MJ Warshawsky, *Journal of Risk and Insurance* 66(2):225-254 (June 2001). (<http://www.tiaa-crefinstitute.org/research/articles/docs/060101.pdf>)

“The Characteristics of Long-Term Care Users,” with WD Spector, JA Fleishman, and LE Pezzin. Paper commissioned by the Institute of Medicine Committee on Improving Quality in Long-Term Care, published by Agency for Healthcare Research and Quality, AHRQ Pub. No. 00-0049, September 2000. (<http://www.ahrq.gov/research/lcusers>)

“Potential and Active Family Caregivers: Changing Networks and the ‘Sandwich’ Generation,” with LE Pezzin, *The Milbank Quarterly* 78(3):347-374 (Fall 2000). (<http://www.milbank.org/quarterly/7803feat.html>)

“Public Health Coverage for Adults: How States Compare,” The Urban Institute: Washington, DC Assessing the New Federalism Policy Brief B-22, July 2000. (http://newfederalism.urban.org/pdf/anf_b22.pdf)

“Adults without Health Insurance: Do State Policies Matter?” *Health Affairs* 19(4): 178-187 (July/August 2000).

“The Effect of Longevity on Spending for Acute and Long Term Care,” with J Lubitz, *The New England Journal of Medicine*, 342(19):1409-1415 (May 11, 2000). (<http://content.nejm.org/content/vol342/issue19/index.shtml>)

“The Amount, Distribution, and Timing of Lifetime Nursing Home Use,” with CM Murtaugh, P Kemper, and BL Carlson, *Medical Care*, March 1997.

“Risky Business: Long Term Care Insurance Underwriting,” with CM Murtaugh and P Kemper, *Inquiry*, 32 (Fall 1995):271-284.

“Lifetime Patterns of Payment for Nursing Home Care,” with P Kemper, *Medical Care* 33(3): 280-296, March 1995.

“The Impact of Being Uninsured on Utilization of Basic Health Care Services,” *Inquiry*, Winter 1992.

“Long Term Care Arrangements for Elderly Persons with Disabilities: Private and Public Roles,” with P Kemper, *Home Health Care Services Quarterly*, Winter 1992.

“A Lifetime Perspective on Proposals for Financing Nursing Home Care,” with P Kemper and CM Murtaugh, *Inquiry*, Winter 1991.

“Nursing Home Use after Age 65 in the United States: Differences in Remaining Lifetime Use among Subgroups and States,” with P Kemper and CM Murtaugh, Conference Proceedings, 4th

International Conference on Systems Science in Health-Social Services for the Elderly and the Disabled, Barcelona, Spain, June 1991.

“The Risk of Nursing Home Use in Later Life,” with CM Murtaugh and P Kemper, *Medical Care*, October 1990.

Access to Health Insurance and Health Care: An Economic Analysis of the Uninsured. Ph.D. dissertation, Syracuse University, Ann Arbor, MI: University Microfilms, 1989.

Technical appendix to "An Evaluation of Utah's Primary Care Case Management Program for Medicaid Recipients," HCFA Contract No. 500-83-0058, 1987.

Book Reviews

“The Assisted Living Residence: A Vision for the Future,” *Journal of Aging and Social Policy* 22(1): 89-93, 2010.

“Who Will Pay for Long Term Care? Insights from the Partnership Programs,” *Journal of Aging and Social Policy* 15(1), Summer 2003.

Awards and honors

Urban Institute President’s Award for Outstanding Research Publication, Policy Research, 2010.

Institute of Actuaries (UK) Synergies of Pensions and Long-Term Care Special Prize, for “In Sickness and in Health: An Annuity Approach to Financing Long-term Care and Retirement Income,” August 2001.

Administrator’s Award of Merit for research on lifetime use of nursing home care, U.S. Department of Health and Human Services, Agency for Health Care Policy and Research, 1992.

Presentations

“Black-white Differences in Disability-free Life Expectancy in the US Population over 30 Years. Population Association of America, Washington DC, April 2016.

“Beyond Spend-down: The prevalence and process of transitions to Medicaid,” ASPE Long-Term Care Financing Colloquium, July 30, 2015; AcademyHealth LTSS Interest Group meeting, Minneapolis, June 2015

“Understanding nursing home entry and Medicaid transition among the Medicare elderly,” National Association of States United for Aging and Disabilities (NASUAD) National Home and Community Based Services Conference, Crystal City, VA, September 2014.

“Dementia and Informal Caregiving: Analyses of the National Study of Caregiving,” presentation before the National Alzheimer’s Plan Act Advisory Council, July 21, 2014.

“Medicaid Health Homes: Early Evaluation Findings on Issues in Care Coordination and HIT,” in-service briefing, DHHS/Office of the Assistant Secretary for Planning and Evaluation, June 2014.

“Informal Caregiving for Older Americans,” briefing for the Administration for Community Living, April 2014.

“Beyond Spend-down: The prevalence and process of transitions to Medicaid,” Economics of Aging Symposium, Gerontological Society of America, New Orleans, November 2013.

“Residential Care Estimates from the National Health and Aging Trends Study,” NHATS Early Results Workshop and Annual Disability TRENDS Network meeting, Ann Arbor, MI, April 2013, Gerontological Society of America, New Orleans, November 2013.

“Potential National and State Medical Care Savings from Primary Disease Prevention,” Annual Arts and Sciences of Health Promotion Conference, Hilton Head, March 2013.

“Implications of disability onset before late life for supportive services,” Gerontological Society of America, San Diego, November 2012; AcademyHealth Annual Research Meeting, Orlando, June 2012; Population Association of America, April 2013.

“Applications of NHATS Data: Identifying and tracking care arrangements,” NHATS Users Workshop, Gerontological Society of America, San Diego, November 2012.

“Trends in Late-life Functioning: Have Improvements Stalled?” AcademyHealth Annual Research Meeting, Seattle, June 2011.

“Potential National and State Medical Care Savings from Primary Disease Prevention,” coauthored with B Ormond and T Waidmann, at a legislative briefing sponsored in part by the Massachusetts Public Health Association and at a hearing of the Massachusetts Legislature’s Joint Committee on Public Health, Boston, June 2011.

“Alternative Measures of Self-Reported Disability,” Population Association of America Annual Meeting Poster Presentation, Washington, DC, April 2011.

“Trends in Late-Life Activity Limitations: An Update from 5 National Surveys,” Population Association of America Annual Meeting, April 2011; annual meeting of the TRENDS Network, University of Michigan Center on the Demography of Aging, Ann Arbor, March 2011.

“The National Health and Aging Trends Study: A New Resource for Studying Disability Trends and Dynamics,” with Judy Kasper, National Center for Health Statistics, Washington, DC, February 2011.

“Private Financing of Long Term Care: Market Penetration and Market Potential,” AcademyHealth Annual Research Meeting Poster Presentation, Boston, June 2010.

“Modeling Potential Savings from Prevention,” AcademyHealth Annual Research Meeting, Boston, June 2010.

“Elderly Disability Rates in the National Long Term Care Survey, 1984 to 2004,” annual meeting of the TRENDS Network, University of Michigan Center on the Demography of Aging, Ann Arbor, April 2010.

“Tracking the Consequences of Disability in the National Health and Aging Trends Study,” the American Public Health Association annual meeting, Philadelphia, and the Gerontological Society of America, Atlanta, November 2009.

“The Role of Midlife Obesity in Late Life Health Outcomes,” AcademyHealth Annual Research Meeting, Chicago, June 2009.

“Formal and informal eldercare: Key Findings, Trends, and Policy Implications from the 2004 National Long-Term Care Survey and Informal Caregiver Supplement,” NIH-sponsored meeting, 2004 Wave of National Long Term Care Survey: New Research Directions, Bethesda, MD, May 2009.

“Persistent Obesity and Morbidity, Mortality, Medicare Spending, and Disability after Age 65,” Gerontological Society of America annual research meeting, Washington, DC, November 2008.

“Risk of Alzheimer's Disease and Related Dementias and Duration of Disability in Later Life,” presented by co-author, Christopher Murtaugh, at a Gerontological Society of America symposium, Washington, DC, November 2008.

“Trends in Family Caregiving and Why It Matters,” National Health Policy Forum, Washington, DC, September 2007.

“Caregiving Demographics,” MetLife Caregiving Research Summit, Washington, DC, June 2007.

“Assistive Device Use Among the Elderly,” Second Annual Meeting of the TRENDS Network, University of Michigan Center on the Demography of Aging, Ann Arbor, June 2007.

“Personal Financing Options for Long Term Care,” commissioned presentation, Building Bridges: Making a Difference in Long-Term Care Colloquium, Consumer Preparedness for Long Term Care, AcademyHealth Adjunct Meeting, Orlando, June 2007.

“Does High Caregiver Stress Lead to Nursing Home Entry?” Call for Papers Session, Transitions Between Care Providers: Risks and Opportunities, AcademyHealth Annual Research Meeting, Orlando, June 2007.

“Trends in Family Caregiving,” Joint Conference of the American Society on Aging and the National Council on Aging, Preconference Special Program, Family Caregiving: State of the Art, Future Trends, Chicago, March 2007.

“Primary Informal Caregivers: Factors Associated with High Stress,” Caregiver Health as a Public Health Issue, ASPE sponsored international invitational meeting, UI, September 2006.

“Primary Informal Caregivers: Factors Associated with High Stress,” Gerontological Society of America annual research meeting, Orlando, November 2005.

“The Size and Characteristics of the Residential Care Population: Evidence from Three National Surveys,” Gerontological Society of America annual meeting, Orlando, November 2005.

“Why We Need a National Mortality Followback Program: A researcher’s view,” as part of “A Call for a Revitalized National Mortality Followback Survey,” a White House Council on Aging, Independent Aging Event, sponsored by American for Better Care of the Dying, Washington, DC, Russell Senate Office Building, July 2005.

“Lifetime Risk and Duration of Disability and Long Term Care,” as part of an invited symposium “Elder Disability Trends: Causes, Implications and Consequences,” Boston, AcademyHealth Annual Research Meeting, June 2005.

“Declines in Elderly Disability Rates: What Has Really Changed?” National Long Term Care Survey Fall Conference, Washington, November 2004.

"Lifetime Risk of Chronic Disease and Disability," Gerontological Society of America annual meeting, Washington, November 2004.

"Informal Caregiving and Caregivers in a Changing Environment," Gerontological Society of America annual meeting, Washington DC, November 2004.

“Declines in Elderly Disability Rates: What Has Really Changed?” Society of Government Economists biennial conference, “Economic Challenges of an Aging Society,” Washington, November 2004.

“Private LTC Financing: The Markets for Combined Income/LTC Annuities and LTC Insurance,” AcademyHealth annual meeting, San Diego, June 2004.

"Using the NLTCs to Examine Declining Disability and Medicare Costs," Gerontological Society of America annual meeting, San Diego, November 2003.

“Does the Health Care Safety Net Narrow the Access Gap?” National Association of Community Health Centers Annual Convention & Community Health Institute, invited panel, Atlanta, August 2003.

“Declines in Elderly Disability Rates: What Has Really Changed?” Joint Conference of the National Council on Aging and the American Society on Aging, invited panel, Chicago, March 2003.

“Resolving Inconsistencies in Old-Age Disability Trends: Report from a Technical Working Group,” Population Association of America annual meeting, March 2003.

“Declines in Elderly Disability Rates: What Has Really Changed?” Third International Conference on Family Care, ASPE-sponsored invited papers session, “Federal Statistics on Caregiving: Recent Findings, Policy Implications, and Policy Uses,” Crystal City, October 2002.

“An Annuity Approach to Integrating Long Term Care Financing and Retirement Income,” 15th Annual Private Long Term Care Insurance Conference, Miami, August 2001.

“Declines in Elderly Disability Rates: What Has Really Changed?” 15th Annual Private Long Term Care Insurance Conference, Miami, August 2001.

“Declines in Elderly Disability Rates: What Has Really Changed?” Association for Health Services Research and Policy annual meeting, Atlanta, June 2001.

“Policy Implications of an Annuity Approach to Integrating Long Term Care Financing and Retirement Income,” Home Care Research Initiative Annual Meeting, Scottsdale, AZ, December 2000.

“New Estimates of Lifetime Nursing Home Use: Have Patterns of Use Changed?” Gerontological Society of America annual meeting, Washington, DC, November 2000.

“Policy Implications of an Annuity Approach to Integrating Long Term Care Financing and Retirement Income,” Gerontological Society of America annual meeting, Washington, DC, November 2000.

“In Sickness and in Health: An Annuity Approach to Financing Long -Term Care and Retirement Income,” American Risk and Insurance Association annual meeting, Baltimore, MD, August 2000.

“Integration of the Life Annuity and Long Term Care Insurance: Theory, Evidence, Practice, and Policy,” Pension Research Council Conference on “Innovations in Managing the Financial Risks of Retirement,” The Wharton School, University of Pennsylvania, Philadelphia, May 2000.

“Impact of State Spending for Home Care on Frail Elders,” poster, Gerontological Society of America annual meeting, San Francisco, November 1999.

“Adults Without Health Insurance: Do State Policies Matter?” American Public Health Association annual meeting, Chicago, November 1999.

“In Sickness and in Health: An Investigation into the Advantages of Incorporating Long-term Care Benefits into the Life Annuity Payout Stream,” TIAA-CREF Institute, New York, August 1999.

“Adults Without Health Insurance: Do State Policies Matter?” National Academy for State Health Policy 12th Annual State Health Policy Conference, Cincinnati, Ohio, August 1999.

“In Sickness and in Health: An Investigation into the Advantages of Incorporating Long-term Care Benefits into the Life Annuity Payout Stream,” National Bureau of Economic Research Summer Institute, Boston, July 1999.

“The Characteristics of Long-Term Care Users,” poster, Association for Health Services Research annual meeting, Chicago, June 1999.

“A Comparison of Nursing Home Resident Characteristics: 1987 to 1996,” Gerontological Society of America annual meeting, Cincinnati, November 1997.

“Potential and Active Family Caregivers: Changing Networks and the ‘Sandwich’ Generation,” American Public Health Association meetings, Indianapolis, November 1997.

“Premiums for Nursing Home Insurance: Adverse Selection, Policy Characteristics, and the Price of Coverage,” American Public Health Association meetings, Washington, DC, November 1994.

“Long Term Care and Assets of the Elderly,” American Public Health Association meetings, Washington, DC, November 1992.

“Lifetime Spenddown to Medicaid Eligibility in Nursing Homes,” Gerontological Society of America annual meeting, Boston, November 1990.

“A Lifetime Perspective on Proposals for Financing Nursing Home Care,” American Public Health Association meetings, New York, October 1990.

“The Impact of Being Uninsured on Use of Basic Health Care Services,” Allied Social Science Associations meetings, Atlanta, GA, December 1989.

“Personal Care and Supportive Services: Distribution of Use, Provision, and Resources among the Disabled Elderly,” American Public Health Association meetings, Chicago, October 1989.

Other Professional Activities

Invited participant, “The Quality of Home- and Community-Based Services: Strategy Directions for Research and Policy,” sponsored by AcademyHealth, February 11, 2015.

Member, NIA sponsored Disability Trends Network, University of Michigan Center on the Demography of Aging, 2006-present.

Member, CLASS Model Technical Advisory Group to advise ASPE in its modeling efforts in support of the new Community Living Assistance Services and Support program included in the ACA.

Member, technical expert panel for development of the LTCA file, a long term care database constructed from CMS administrative data.

Chair, AcademyHealth Long Term Care Interest Group, 2009-2011.

Peer reviewer for scholarly journals, including *The New England Journal of Medicine*, *Health Services Research*, *Health Affairs*, *Health Economics*, *Medical Care*, *Inquiry*, *Journals of Gerontology*, *The Gerontologist*, *Journal of the American Medical Association*, *American Journal of Public Health*, *Demography*, and the *Journal of Aging and Social Policy*.

Reviewer, long term care abstracts submitted for the AcademyHealth annual research meeting, 2007, 2008.

Reviewer, abstracts submitted for the Gerontological Society of America annual meeting, 2007, 2008.

Member, Centers for Medicare and Medicaid Services Long Term Care Data Users Group, Washington DC, March 2008.

Invited participant and presenter, AARP-sponsored expert panel on longevity and health care costs, Washington DC, December 2007.

Invited participant, AARP-sponsored expert panels on long term care reform, Washington DC, December 2007.

United Hospital Fund sponsored expert panel on development of an informal caregiver survey for New York State, New York City, October 2007.

Invited participant, MedPac expert panel on the effects of changes in the profile of Medicare beneficiaries in the 21st century, Washington DC, November 2006.

Convener, Technical Expert Panel, Analyses of Informal Caregiving: Evidence from the Informal Caregiving Supplement to the 1999 National Long-Term Care Survey, Washington DC, 2004.

Reviewer, RWJ-sponsored Information Brokering for LTC Program, 2003.

Member, Department of Health and Human Services/ASPE-sponsored Technical Advisory Panel on Development of an Assistive Technology and Environmental Assessment Instrument for National Surveys, 2003.

Member, NIA sponsored Technical Working Group on Inconsistencies in Old-Age Disability Trends, August 2002.

National Multiple Sclerosis Society, Review Committee on Health Care Delivery and Policy Research, 1998-2003.

Reviewer, Robert Wood Johnson Home Care Research Initiative, 1997.

Technical Advisory Committee, Long-Term Care Insurance Policy Ownership and Patterns of Formal and Informal Caregiving: A Comparative Analysis of Privately Insured and Non-Privately Insured Disabled Elders, a project sponsored and funded by the Department of Health and Human Services and the Robert Wood Johnson Foundation, 1997.

Guest lecturer, "Long Term Care: An Overview of Research Findings," Johns Hopkins University Business of Medicine Program, 1997-1998.

Interagency Forum on Aging-Related Statistics, technical representative for AHCPR, 1995-1998.

Technical Expert Panel, Consumer Guide to Post-Hospitalization Care Options, a SPRY Foundation project funded by the Health Care Financing Administration, 1995.

Advisory Panel, Veterans Administration Long Term Care Planning Models, 1995.

Technical assistance, Senator Ted Kennedy's staff: Voluntary public nursing home insurance, premium estimates and analysis, 1993-1994.

Technical assistance, Office of the Assistant Secretary for Planning and Evaluation, DHHS: Comparison of long term care provisions in alternative health reform bills, 1993-1994.

Technical assistance, Long Term Care Work Group of President Clinton's Health Reform Task Force, 1993: Financing options, Medicaid asset spenddown, voluntary public nursing home insurance analysis.

Research assistant, S.H. Long and R.F. Settle, "An Evaluation of Utah's Primary Care Case Management Program for Medicaid Recipients," *Medical Care*, 26(November 1988).

Research assistant, S.H. Long, R.F. Settle, and B.C. Stuart, "Reimbursement and Access to Physicians' Services under Medicaid," *Journal of Health Economics*, 5(1986).

Research assistant, S.H. Long and T.M. Smeeding, "Alternative Medicare Financing Sources," *Milbank Memorial Fund Quarterly*, Spring 1984.

Member, eligibility, and cost sharing analysis teams, Medicaid Program Evaluation, HCFA Contract No. 500-83-0058.