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Integrating Serious Illness Care into Primary Care Delivery

A VIRTUAL WORKSHOP

**June 10 & 17, 2021
12:00-3:00 PM ET**

#SeriousIllnessCareNAEM

Roundtable on Quality Care
for People with Serious Illness

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ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS

June 2021

Dear Colleagues:

Welcome to the workshop on *Integrating Serious Illness Care into Primary Care Delivery*, hosted by the Roundtable on Quality Care for People with Serious Illness at the National Academies of Sciences, Engineering, and Medicine. Due to restrictions on travel and public gatherings during the COVID-19 pandemic, the full-day workshop originally scheduled as an in-person meeting in Washington, DC has been converted into two webinars that will be held on June 10 and June 17, 2021.

The first webinar will feature brief opening remarks by Dr. Ada Stewart, President of the American Academy of Family Physicians. The first session of the workshop will explore the shared principles of primary care, serious illness care, and specialty palliative care as outlined in the 2021 NASEM report on *Implementing High Quality Primary Care*, as well as the National Consensus Project (NCP) *Clinical Practice Guidelines for Quality Palliative Care*. These presentations will be anchored in the lived experience of an individual's story with serious illness navigating both primary care and specialty palliative care. The second session explores the interdisciplinary care teams that deliver both primary care and palliative care, with a discussion of opportunities to raise the bar for caring for people with serious illness care in all communities.

The June 17 webinar will feature two sessions as well. The workshop will open with another patient's story, leading into the day's first session exploring the policy mechanisms to support high quality serious illness care and the ways in which quality measurement, policy, research, and payment can be aligned to improve patient and caregiver experience. The final session of the workshop features real-life examples of 'building the bridge' between serious illness care and primary care to deliver high-quality, integrated care. Speakers will discuss best practices for embedding palliative care into primary care, and considerations for sustainability.

Each of the workshop sessions will include a brief panel discussion, followed by Q&A with webinar participants. A summary of this workshop will be published by the National Academies Press. The webinar's meeting materials as well as a video archive of the webinar will be available at: <https://www.nationalacademies.org/our-work/integrating-serious-illness-care-into-primary-care-delivery-a-workshop>

We hope you will find the workshop presentations informative, thought-provoking, and inspiring, and that the suggestions made by the workshop participants will ultimately contribute to improved care for people with serious illness.

Sincerely,

Phil Rodgers, MD, FAAHPM
Professor of Family Medicine
Director, Palliative Care Clinical Programs
University of Michigan School of Medicine

Patricia Davidson, PhD
Vice Chancellor, University of Wollongong,
Australia (as of April 2021)
Dean, Johns Hopkins University School of
Nursing (through March 2021)

ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS

**Integrating Serious Illness Care into Primary Care Delivery
A Workshop**

Part 1
June 10, 2021
12:00-3:00 PM ET

WEBINAR NOTES

- Join the webcast via this link:
<https://nasem.zoom.us/j/93542407499?pwd=QVRDWIJ6cDZoUG9TcFpLZFZzWHJCQT09>
- An archive of the video webcast and presentation slides will be available at:
<https://www.nationalacademies.org/event/06-10-2021/integrating-serious-illness-care-into-primary-care-delivery-a-workshop-first-webinar>
- Proceedings of the workshop will be published following National Academies procedures. Rapporteurs will compose the proceedings from the workshop transcript and external reviewers will examine the proceedings to make sure it accurately reflects workshop discussions and conforms to institutional policies.
- Interested in receiving updates from the Roundtable on Quality Care for People with Serious Illness or the National Academies of Sciences, Engineering, and Medicine's Health and Medicine Division?

Sign up for the **Roundtable** listserv at:

<https://www.nationalacademies.org/hmd/Activities/HealthServices/QualityCareforSeriousIllnessRoundtable.aspx>

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Roundtable on
Quality Care for People with Serious Illness

Integrating Serious Illness Care into Primary Care Delivery
A Two-Part Virtual Workshop

AGENDA

WEBINAR 1: June 10, 2021 12:00 – 3:00 PM ET	
12:00 PM	Welcome from the Roundtable on Quality Care for People with Serious Illness Peggy Maguire, JD Cambia Health Foundation James Tulsky, MD Dana-Farber Cancer Institute, Brigham and Women's Hospital, Harvard Medical School <i>Roundtable Co-Chairs</i>
12:05 PM	Overview of the Virtual Workshop Phil Rodgers, MD, FAAHPM Professor, Family Medicine and Internal Medicine Co-Director, Clinical Palliative Care Program University of Michigan School of Medicine Patricia Davidson, PhD Vice Chancellor, University of Wollongong, Australia (as of April 2021) Dean, Johns Hopkins University School of Nursing (through March 2021) <i>Planning Committee Co-Chairs</i>

12:10 PM	SESSION ONE: Exploring the Shared Principles of Serious Illness Care and Primary Care <i>Opening Remarks:</i> Ada D. Stewart, MD, FAAFP President American Academy of Family Physicians <i>Moderator:</i> Claire Ankuda, MD, MPH Assistant Professor, Geriatrics and Palliative Medicine Mt. Sinai School of Medicine <i>Speakers:</i> Shirley Roberson C-TAC Fellow Member, Board of Directors Erin Bradshaw Chief of Mission Delivery Patient Advocate Foundation Martha L. Twaddle, MD Medical Director for Palliative Medicine & Supportive Care Northwestern Medicine - Lake Forest Hospital Clinical Professor of Medicine, Northwestern Feinberg School of Medicine Carlos Roberto Jaén, MD, PhD, MS, FAAFP The Dr. and Mrs. James L. Holly Distinguished Chair, Patient Centered Medical Home, and Professor and Chair of Family and Community Medicine and Professor of Population Health Sciences Joseph R. and Teresa Lozano Long School of Medicine, UT Health San Antonio Adjunct Professor of Public Health, UT Health School of Public Health
12:50 PM	Panel Discussion
1:15 PM	Audience Q&A
1:30 PM	SESSION TWO: The Role of Interdisciplinary Teams in Caring for People with Serious Illness in Primary Care Settings <i>Moderator:</i>



	Lori Bishop MHA, BSN, RN Vice President of Palliative and Advanced Care National Hospice and Palliative Care Organization <i>Speakers:</i> Marianne Logan Fingerhood, DNP, CRNP, ANP-BC Track Coordinator Adult/Gerontological NP Program SNAPT Nurse Practitioner Fellowship Program Director Assistant Professor, Johns Hopkins School of Nursing Karen Bullock, PhD Professor and Head of the School of Social Work North Carolina State University Gregg VandeKieft, MD, MA, FAAFP, FAAHPM Medical Director, Palliative Practice Group Providence Institute for Human Caring Palliative Care Physician, Clinical Ethicist Providence St. Peter Hospital Danetta E. Sloan, PhD, MSW, MA Assistant Scientist Johns Hopkins University Bloomberg School of Public Health Russell S. Phillips, MD Director, Center for Primary Care Harvard Medical School
2:25 PM	Panel Discussion
2:45 PM	Audience Q&A
3:00 PM	Closing Remarks/Webinar Adjourns

ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS

Integrating Serious Illness Care into Primary Care Delivery

A Two-Part Virtual Workshop

Part 1
June 10, 2021

SPEAKERS AND MODERATORS

Claire Ankuda, MD

Assistant Professor, Geriatrics and Palliative
Medicine
Icahn School of Medicine, Mount Sinai

Lori Bishop, MHA, BSN, RN

Vice President of Palliative & Advanced
Care
National Hospice & Palliative Care
Organization

Erin Bradshaw

Chief of Mission Delivery
Patient Advocate Foundation

Karen Bullock, PhD

Professor and Head of the School of Social
Work
North Carolina State University

**Patricia M. Davidson, PhD, MED, RN,
FAAN**

Vice Chancellor, University of Wollongong,
Australia

Carlos Roberto Jaén, MD, PhD, FAAFP

The Dr. and Mrs. James L. Holly Distinguished
Chair, Patient Centered Medical Home
Professor and Chair of Family and
Community Medicine
Professor of Population Health Sciences
Joseph R. and Teresa Lozano Long School of
Medicine, UT Health San Antonio
Adjunct Professor of Public Health, San
Antonio Campus
UTHealth School of Public Health

Marianne Logan Fingerhood, DNP, ANP-BC

Track Coordinator Adult/Gerontological NP
Program
SNAPT Nurse Practitioner Fellowship
Program Director
Assistant Professor, Johns Hopkins School of
Nursing

Russell S. Phillips, M.D.

Director
Harvard Medical School
Center for Primary Care

Shirley Roberson

C-TAC Fellow
Member, Board of Directors

Phillip Rodgers, M.D., F.A.A.H.P.M.

Professor, Family Medicine and Internal
Medicine
Co-Director, Clinical Palliative Care Program
University of Michigan School of Medicine

Danetta E. Sloan, PhD

Assistant Scientist
Johns Hopkins University Bloomberg School
of Public Health

Ada D. Stewart, MD

President
American Academy of Family Physicians

**Martha L. Twaddle MD FACP FAAHPM
HMDC**

The Waud Family Medical Directorship
Palliative Medicine & Supportive Care
Clinical Professor of Medicine
Northwestern Medicine

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Gregg VandeKieft, MD, MA

Medical Director, Palliative Practice Group

Providence Institute for Human Caring

Palliative Care Physician, Clinical Ethicist

Providence St. Peter Hospital

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SPEAKERS AND MODERATORS

Claire Ankuda, MD, is an Assistant Professor in the Department of Geriatrics and Palliative Medicine at the Icahn School of Medicine at Mount Sinai. A Vermonter, she earned an MD from the University of Vermont and a MPH from the Harvard School of Public Health before going to the University of Washington for family medicine residency. She was then a Robert Wood Johnson Clinical Scholar at the University of Michigan during which time she conducted a 6-month policy externship at the Center for Medicare & Medicaid Innovation. Following this, she completed a Palliative Medicine fellowship at Mount Sinai. Dr. Ankuda is a health services researcher who aims to assess the impact of payment policies and health systems on outcomes for seriously ill older adults and their families.

Lori Bishop, MHA, BSN, RN is a healthcare nurse executive focused on innovative and transformational interdisciplinary care delivery models for the vulnerable seriously ill population. Lori has an extensive clinical background in hospice and palliative care. Her current position is Vice President of Palliative and Advanced Care at NHPCO. Previously, Lori was the Chief Advanced Illness Management (AIM) Executive for Sutter Health serving an average daily census of 2500 seriously ill patients across Northern California. Under her leadership, the Sutter Health AIM program reduced total program cost by 13% two consecutive years while achieving full performance for quality metrics. In 2017, she restructured the program including widespread implementation of primary palliative care in home health; implemented a standard palliative care patient satisfaction survey through a national vendor; implemented daily huddle, bi-weekly case conference, and monthly care conference leveraging patient level data to drive performance and care coordination. AIM received the inaugural Vanguard Award from the California Hospital Quality Institute in 2016. In her previous executive role at UnityPoint Health, Lori facilitated the creation of a system-wide palliative care program across care settings by developing standard clinical, operational, satisfaction, and financial metrics across sites of service. The system-wide integrated Palliative Care program received the prestigious Circle of Life Award in 2013. The team enhanced and optimized the electronic health record to pull clinical data for metric reporting and shared their build with other Epic users.

Erin Bradshaw is the Chief of Mission Delivery for the Patient Advocate Foundation. She provides leadership in the design, delivery, and oversight of the case management division to ensure the achievement of the organization's philosophy, mission and goals and objectives. Her 23 years' experience with PAF has been spent improving patients' lives around the nation.

Karen Bullock, PhD, LCSW is Professor and Head of the Department of Social Work at North Carolina State University, in the College of Humanities and Social Sciences. She earned her PhD in Sociology and Social Work from Boston University, her Master's degree in Social Work, from Columbia University, and her Bachelor of Social Work degree from North Carolina State University. She is Affiliate Faculty at the Institute for Collaboration on Health, Intervention, and Policy (InCHIP) at the University of Connecticut. Dr. Bullock has more than 20 years of clinical practice experience

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in mental health and aging, with interests and expertise in health care disparities and end-of-life care issues. She is a John A. Hartford Faculty Scholar and serves on several national boards and committees, including Social Work Hospice & Palliative Care Network (SWHPN), the American Cancer Society (ACS) Oncology Social Work Research Peer Review Committee, and is current Chair of the NASW Mental Health Section Committee. Dr. Bullock's research focuses on cancer care and social support for older adults with non-curable illnesses. Her article on The Influence of Culture on End-of-Life Decision Making, won the 2012 Best Article Award by the Routledge Journal of Social Work in End-of-Life & Palliative Care. She has been a leading force in advancing social work practice, education, and training in gerontology, mental health, palliative and end-of-life care. In addition, Dr. Bullock he has been quoted in the Washington Post, USA Today and LA Times as an expert in these areas. Dr. Bullock has published and presented nationally and internationally on these topics. She was a Visiting Scholar at the Mailman School of Public Health at Columbia University and previously held appointments at the Institute of Living/Hartford Hospital, the University of Connecticut, Salem State College, Smith College, and UNC-Wilmington.

Patricia M. Davidson, PhD, MED, RN, FAAN Across her career, Dr. Davidson has been committed to developing innovative, person-centered models of care. She has been a registered nurse for four decades and has clinical, teaching and practice expertise in cardiovascular science and the care of vulnerable populations, particularly those with chronic and complex conditions. As Dean and Professor of the Johns Hopkins School of Nursing, she is strongly involved in doctoral education and strongly committed to mentorship of new investigators. She is committed to diversity, equity, inclusion and workforce development and interdisciplinary practice. To promote these values, she currently serves as the Secretary General of the Secretariat of the World Health Organizations Collaborating Centers for Nursing and Midwifery, and Counsel General of the International Council on Women's Health Issues. She is a member of Sigma Theta Tau International's Institute for Global Healthcare Leadership Advisory Board and a Board Member of the Consortium of Universities for Global Health. She also serves on the Board of Health Care Services for the National Academies of Sciences, Engineering, and Medicine. Throughout her career she has been devoted to mentoring the next generation of health professionals and scientists. Across her career she has mentored 43 pre-doctoral and 15 post doctoral trainees. She has also been actively involved in mentorship of early career researchers and nurse scientists. In 2016 she was the first nurse to receive the Australian Museum Eureka Prize for Outstanding Mentor of Young Researchers, the most prestigious research mentorship award in Australia. Dr. Davidson has over 550 publications in Scopus. Her H -Index is 45 (Scopus) and 66 in Google Scholar and i-10 Index is 385 and she has published 32 book chapters. Many of these publications are with students, mentees, clinical collaborators and fellow nurse scientists. Over her career she has received funding as principal investigator from the National Institutes of Health, the National Health & Medical Research Council (NIH Equivalent Australia), Australian Research Council (NSF Equivalent Australia). She also currently serves as the Co- Director of the Enrichment Core for the NINR P30 Promoting Resilience in Persons with Multiple Chronic Conditions Promote Center (PI Szanton) and she is also an advisor to the NINR Funded Palliative Care Research Collaborative (PI Kutner).

Carlos Roberto Jaén, M.D., Ph.D. is the Holly Distinguished Chair, Patient-Centered Medical Home, Professor and Chair of Family & Community Medicine, and Professor of Population Health at the Joe and Teresa Lozano Long School of Medicine, UT Health San Antonio. Dr. Jaén's research interests focus on improving preventive care for individuals of all ages and preventing complications from chronic diseases like diabetes, high blood pressure, and heart disease. He is passionate about

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building and studying high performance primary care offices. He served on the panels that published smoking cessation guidelines in 1996 and 2000 and was Co-Chair of the panel that published an update in May 2008. In 2005, he was appointed to the National Advisory Council of the Agency for Healthcare Research and Quality (AHRQ) and was an appointed member of the New York State Public Health Council. He was Co-Director of the Center for Research in Family Medicine and Primary Care. The Center studied more than 500, mostly independent, primary care practices during almost 20 years. He received a Generalist Physician Faculty Scholar Award from the Robert Wood Johnson Foundation and a Cancer Control Career Development Award for Primary Care Physicians from the American Cancer Society. His interests include building a healthier San Antonio through efforts in community wellness.

Dr. Jaén has his Ph.D. in Epidemiology and Community Health from the State University of New York (SUNY) Buffalo, and his M.D. from the same university. He completed a residency in Family Medicine and a Primary Care Research Fellowship at Case Western Reserve University in Cleveland Ohio. He is a practicing family physician and has been selected to Best Doctors in America yearly since 2002. He was elected to the Delta Omega Honorary Society in Public Health in 2017 and received the 2018 Texas Academy of Family Physicians Public Health Award. He serves as Chair of the Board of Regents of the National Library of Medicine of the NIH. He was Chair of the Board of Directors of the American Board of Family Medicine in 2014 and was elected to the National Academy of Medicine of the National Academies in 2013.

Marianne Logan Fingerhood, DNP, ANP-BC is an Adult primary care Nurse Practitioner with 36 years of clinical experience and 22 years as an advanced practice nurse. She has been teaching in nursing for more than 30 years, for the last 8 years as faculty in the advanced practice NP programs. Recently she added the responsibility as the track coordinator for the Adult Gerontological Nurse Practitioner program at Johns Hopkins University School of Nursing. Her areas of interest are chronic disease management and Nurse Practitioner transition to practice. Through a grant from the Maryland Higher Education Commission she has developed a Nurse Practitioner Transition to Practice Fellowship which began in January 2021. Throughout her career Marianne has been dedicated to quality patient care and helping students move from academia to practice.

Russell S. Phillips, M.D. is Director of the Center for Primary Care and the William Applebaum Professor of Medicine and Professor of Global Health and Social Medicine at Harvard Medical School. He is a general internist at Beth Israel Deaconess Medical Center, where he provides primary care in Healthcare Associates, a large teaching practice. He has been a leader in innovation in practice and payment in primary care, implementing new care models for patients with chronic illness and, using micro-simulation, testing the impact of global payment on value. He has served on a Massachusetts Health Quality Partners Advisory Group on the future of primary care. In Massachusetts, he is advocating for access to primary care, global payment for primary care, and financial support for small, independent practices threatened by the financial strain imposed by COVID-19. He is a leader in oral health integration into primary care and served on a Patient-Centered Collaborative Advisory Committee on Oral Health Integration and is Co-Principal Investigator on a related HRSA-funded Academic Unit. Dr. Phillips has expertise in the evaluation of innovations in care, systems improvement, patient safety, and quality of care and is a member of the Center's care integration study team. In his prior work at BIDMC, which included serving as Chief of the Division of General Medicine and Primary Care for a decade, he led a task force to improve transitions in care, a working group to develop new sustainable practice models

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for primary care, and a task force to develop strategies for care management for high-risk patients. At the state level, he served on the Massachusetts Coordinating Council on the Patient-Centered Medical Home. He has championed palliative care services in primary care, wellness programs, and innovations to improve the quality of life for patients with chronic illness. A graduate of Massachusetts Institute of Technology and Stanford University School of Medicine, he has held leadership roles in the Society of General Internal Medicine, serving as Chairperson of the Research Committee, and as President of the Association of Chiefs and Leaders in General Internal Medicine. With more than 250 publications and an H-index over 110, his research has spanned disparities in care, screening for infection in office practice, patient safety, end of life care, and interventions to improve care for patients with chronic disease. He is the recipient of the two prestigious awards for mentorship at HMS; the Barger Award and the William Silen Lifetime Achievement in Mentoring Award. He led the Harvard General Medicine Fellowship Program for nearly 15 years, and the Harvard Research Fellowship Program in Integrative Medical Therapies for 12 years. He held a Mid-Career Mentorship Award (K24) from the NIH to support his mentoring activities. He has mentored more than 50 trainees, most of whom have gone on to successful careers as investigators and leaders in general medicine and in family medicine. His research has received support from the National Institutes of Health (NIH), the Agency for Healthcare Research and Quality (AHRQ), the Robert Wood Johnson Foundation, the Hartford Foundation, and the Macy Foundation. In his role as Center Director, he has authored more than 20 papers, reviews, and book chapters with a focus on the use of learning collaboratives to transform primary care, the impact of community health workers on resource use, the impact of changes in primary care practice and payment on the finances of primary care practice, and the value of primary care.

Shirley Roberson has a Bachelor Science in Health Sciences and has done extensive research in nutrition and alternative health care modalities. Beginning with patient care under Dr. Jewel Pookrum, Shirley has personally experienced the healing benefits of macrobiotic and vegetarian diets. From her own research in medical science and the latest studies, she has effectively counseled others on natural healing that includes diet, meditation, and spiritual practices. Over the years, Shirley has worked with the Hartford Church Health Ministry in the presentation of several health conferences. The Karmanos Cancer Institute frequently features Shirley as a model for patients with advanced breast cancer. Shirley is frequently sought after to participate in groups and retreats for cancer survivors and is the progenitor of the “Blue Chair” featured in the 2018 National Summit. In addition, Shirley was a graphic designer for over 20 years with her own company located in downtown Detroit, and a technical editing analyst in sales and marketing for the Ford Motor Company. Before pursuing a degree in health science and nursing, she obtained several State certifications in patient care. Shirley obtained her BS degree in Health Sciences but due to the return of stage 4 cancer she was not able to complete the degree program in nursing. Shirley has survived stage 4 cancer for 12 years.

Phillip Rodgers, M.D., F.A.A.H.P.M. is a Professor of Family Medicine and Internal Medicine at the University of Michigan, where has practiced and taught family medicine and subspecialty palliative medicine for nearly 25 years. He is founding director of the UM Palliative Care Program, and a member of the UM Institute for Health Policy and Innovation (IHPI). Dr. Rodgers has become a leading national expert in payment and care delivery innovation in palliative care, and has received numerous invitations to speak, consult and contribute technical expertise to multiple national conveners, stakeholders, and policymakers. He has also held numerous leadership positions

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within the American Academy of Hospice and Palliative Medicine (AAHPM), and led development of AAHPM's proposal for an alternative payment model for palliative care, which has been recommended for testing by the Centers for Medicare and Medicaid Services (CMS) Innovation Center. His work has been recognized with several awards including the University of Michigan Dean's Award for Community Service, the Cambia Health Foundation Sojourns Leadership Award, and the American Academy of Hospice and Palliative Medicine Gerald Holman Distinguished Service Award.

Danetta H. Sloan, PhD, MSW, MA is a Social Work Scientist who has a passion for improving health care equity for aging Black Americans. She believes that it is her Ministry to seek ways to improve health related care and access to care for Blacks through Faith-Centered initiatives. Dr. Sloan is an MSW with training in the diseases of aging. She had a 10-year journey as a medical social worker for those diagnosed with a life limiting disease in the hospital and the terminally ill in the community as a home care hospice social worker. Most of the patients and their families she worked with in hospice were diagnosed with Alzheimer's, cancer, and heart disease. She became a caregiver to her mother, diagnosed with Alzheimer's at 84 years old. Dr. Sloan received her PhD at the National Catholic School of Social Service at The Catholic University of America in Clinical Social Work. Dr. Sloan did her first post-doctoral training at the Pain and Palliative Care Service at the National Institutes of Health Clinical Center and completed a second fellowship at Johns Hopkins University. She is currently a faculty member in the Department of Health, Behavior, and Society at Johns Hopkins Bloomberg School of Public Health. She continues to work on the Divine assignment to be of service to the Black Community. Her investigations involve novel approaches to increase awareness of dementia and related diseases to improve palliative and end of life care focusing on advance care planning. Dr. Sloan has several grants and honors, including the prestigious Cambia Foundation Sojourns Scholar award but none as rewarding as being a conduit for improving health care outcomes in Black communities.

Ada D. Stewart, MD, FAAFP, a family physician with Cooperative Health in Columbia, South Carolina, is president of the American Academy of Family Physicians. The AAFP represents 136,700 physicians and medical students nationwide. As AAFP president, Stewart advocates on behalf of family physicians and patients to inspire positive change in the US health care system. Stewart has been a practicing family physician with Cooperative Health, formerly Eau Claire Cooperative Health Centers, since 2012 and currently serves as lead provider and HIV specialist. A member of the AAFP since 1995, Stewart has served in several leadership positions at the state and national level. She has served on numerous commissions and committees, including as a member of the AAFP Commission on Health of the Public and Science, and past chair of the commission's Tobacco Prevention and Control Advisory Committee. Previously active in the American Medical Association, Dr. Stewart served as AAFP resident delegate to the AMA Resident and Fellow Section and was chair of the AMA Minority Affairs Consortium Governing Council. On the state level, Stewart served the South Carolina Academy of Family Physicians as president-elect, president, board chair and chair of their Commission on Public Health. On the local level, she most recently served as president of the Columbia Medical Society and continues to serve on their executive committee. Stewart is also a member of the American Academy of HIV Medicine, the American Academy of Hospice and Palliative Medicine, the National Medical Association and the American Medical Women's Association. Born and reared in an underserved urban area of Cleveland, Ohio, Stewart has committed her career to ensuring uninsured and low-income families have access to high quality

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health care. She began her career as a National Health Service Corps scholar, caring for underserved patients in rural South Carolina. She continues to work with underserved communities in both rural and urban settings. From 2003 to 2012, Stewart served as chief medical officer and HIV specialist at the Richland Community Health Care Association in Eastover and Columbia, South Carolina. She was recognized in 2017 for her dedicated service in hepatitis C treatment and prevention by the South Carolina HIV/AIDS Council. She was recognized in April 2018 by the South Carolina Chapter of the National Coalition of 100 Black Women, with the Health Award in recognition of her contributions to the health of the community in Columbia. Stewart was recently named to the Presidential Advisory Council on HIV/AIDS. In the aftermath of Sept. 11, 2001, Stewart enlisted in the U.S. Army Reserves and has achieved the rank of Colonel. She is a preceptor for nurse practitioners, medical residents and medical students, and has received numerous awards, including the Alpha Omega Alpha Honor Medical Society 2012 Volunteer Clinical Faculty Award for her precepting at the University of South Carolina School of Medicine. She also conducts continuing education programs relating to HIV, Health Disparities, Hospice and Palliative Medicine and Hepatitis C. Stewart earned her Bachelor of Science degree in pharmacy from Ohio Northern University in Ada, Ohio. Realizing she wanted to have a more direct impact on patients' lives and well-being, she returned to school, completing her medical degree at the Medical College of Ohio and her family medicine residency training at Palmetto Richland Memorial Hospital in Columbia, South Carolina. Stewart has also earned additional certification in HIV care from the American Academy of HIV Medicine and is certified as a hospice medical director by the Hospice Medical Director Certification Board. Stewart is board certified by the American Board of Family Medicine. She has the AAFP Degree of Fellow, an earned degree awarded to family physicians for distinguished service and continuing medical education. On February 16, 2021, Stewart was honored by the South Carolina House of Representatives with Resolution H. 3894 in recognition of her service to the community, our country and her specialty as part of their celebration of Black History Month.

Martha L. Twaddle MD, FACP, FAAHPM, HMDC combines nearly thirty years of experience in the care of seriously ill people and their families in a variety of areas of service. She currently serves as the Waud Family Medical Director for Palliative Medicine & Supportive Care at Northwestern Medicine. Her academic work includes developing curriculum, guidelines and models of care for healthcare professionals to provide care for the seriously ill in all settings. She works with others at Northwestern Feinberg School of Medicine exploring how technology and also prescriptive nature can improve health outcomes as well as collaborating nationally in the development of patient-family centered quality metrics. On behalf of the American Academy of Hospice & Palliative Medicine (AAHPM), Dr. Twaddle served as the Co-Chair for the National Consensus Project for Quality Palliative Care, which completed the 4th edition of the clinical practice guidelines for the field in late October 2018. Dr. Twaddle's unique talents and contributions to the field of Palliative Medicine have helped increase the understanding of and access to this continuum of care, regionally and nationally. In 2013, she was named one of the 30 most influential visionaries in Hospice and Palliative Medicine by nomination of her peers via the AAHPM. She served as President of the AAHPM from 2002-2003 and on the AAHPM Board of Directors from 1997-2004. She represented the AAHPM in the creation of the initial NCP Guidelines published in 2004. She was honored with the inaugural AAHPM Josefina B. Magno Distinguished Hospice Physician Award in 2005. She was recognized in 2016 as a Distinguished Alumni of Purdue's College of Science and "an exemplary educator and pioneering contributor to end-of-life care" as the recipient of the Compassion in Action

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Award by Hospice of the Valley and Santa Clara University in 2015. She was the recipient of the AAHPM Lifetime Achievement Award conferred in March 2019. After graduating summa cum laude from Purdue University, Dr. Twaddle received her medical degree from the Indiana University School of Medicine in Indianapolis and completed her residency in Internal Medicine through Northwestern University McGaw School of Medicine, where she was Chief Resident. She currently serves as an Associate Professor of Medicine for Northwestern University Feinberg School of Medicine and is board certified in Internal Medicine and Hospice and Palliative Medicine.

Gregg VandeKieft, MD, MA, FAAFP, FAAHPM is Medical Director of the Palliative Practice Group for Providence St. Joseph Health, supporting palliative care practices throughout seven western states. He practiced full-spectrum family medicine for nearly 20 years, initially in rural private practice and later in academic settings. For the last 10 years his clinical practice has been exclusively in hospice and palliative medicine. Dr. VandeKieft is Clinical Associate Professor of Family Medicine at the University of Washington. He completed the University of Washington's Certificate Program in Health Care Ethics, Michigan State University's masters program in Health and Humanities, and Harvard Medical School's Program in Palliative Care Education and Practice. He received the 2018 Hastings Center Cunniff-Dixon Physician Award in the Senior Physician category and the 2017 Stuart J. Farber Award for Excellence in Hospice and Palliative Care from the Washington State Hospice and Palliative Care Organization.

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Integrating Serious Illness Care into Primary Care Delivery: A Workshop

Planning Committee Roster

Phillip Rodgers, M.D., F.A.A.H.P.M. (Co-Chair)

Professor, Family Medicine and Internal Medicine
Co-Director, Clinical Palliative Care Program
University of Michigan School of Medicine
Representing the American Academy of Hospice and Palliative Medicine (AAHPM)

Patricia M. Davidson, PhD, MED, RN, FAAN (Co-Chair)

Dean and Professor, School of Nursing
Johns Hopkins University

Claire Ankuda, MD

Assistant Professor, Geriatrics and Palliative
Medicine
Icahn School of Medicine, Mount Sinai

Lori Bishop, MHA, BSN, RN

Vice President of Palliative & Advanced Care
National Hospice & Palliative Care Organization

Jon Broyles, M.Sc

Executive Director
Coalition to Transform Advanced Care (C-TAC)

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Department of Social Work
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Deborah J. Cohen, PhD

Professor of Family Medicine
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Executive Medical Director
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Ann Greiner, MA

President and CEO
Primary Care Collaborative

Rebecca A. Kirch, JD

Executive Vice President, Policy and Programs
National Patient Advocate Foundation

Lars Peterson, MD, PhD

Vice President of Research
American Board of Family Medicine

Tammie Quest, MD

Professor and Chief, Emory Palliative Care
Center, Emory University's Woodruff Health
Sciences Center

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ROUNDTABLE ON QUALITY CARE FOR PEOPLE WITH SERIOUS ILLNESS

**Integrating Serious Illness Care into Primary Care Delivery: A Workshop
Planning Committee Biosketches**

Phillip Rodgers, M.D., F.A.A.H.P.M. (Co-Chair) is a Professor of Family Medicine and Internal Medicine at the University of Michigan, where he has practiced and taught family medicine and subspecialty palliative medicine for nearly 25 years. He is founding director of the UM Palliative Care Program, and a member of the UM Institute for Health Policy and Innovation (IHPI). Dr. Rodgers has become a leading national expert in payment and care delivery innovation in palliative care, and has received numerous invitations to speak, consult and contribute technical expertise to multiple national conveners, stakeholders, and policymakers. He has also held numerous leadership positions within the American Academy of Hospice and Palliative Medicine (AAHPM), and led development of AAHPM's proposal for an alternative payment model for palliative care, which has been recommended for testing by the Centers for Medicare and Medicaid Services (CMS) Innovation Center. His work has been recognized with several awards including the University of Michigan Dean's Award for Community Service, the Cambia Health Foundation Sojourns Leadership Award, and the American Academy of Hospice and Palliative Medicine Gerald Holman Distinguished Service Award.

Patricia M. Davidson, PhD, MED, RN, FAAN (Co-Chair) Across her career, Dr. Davidson has been committed to developing innovative, person-centered models of care. She has been a registered nurse for four decades and has clinical, teaching and practice expertise in cardiovascular science and the care of vulnerable populations, particularly those with chronic and complex conditions. As Dean and Professor of the Johns Hopkins School of Nursing, she is strongly involved in doctoral education and strongly committed to mentorship of new investigators. She is committed to diversity, equity, inclusion and workforce development and interdisciplinary practice. To promote these values, she currently serves as the Secretary General of the Secretariat of the World Health Organizations Collaborating Centers for Nursing and Midwifery, and Counsel General of the International Council on Women's Health Issues. She is a member of Sigma Theta Tau International's Institute for Global Healthcare Leadership Advisory Board and a Board Member of the Consortium of Universities for Global Health. She also serves on the Board of Health Care Services for the National Academies of Sciences, Engineering, and Medicine. Throughout her career she has been devoted to mentoring the next generation of health professionals and scientists. Across her career she has mentored 43 pre-doctoral and 15 post doctoral trainees. She has also been actively involved in mentorship of early career researchers and nurse scientists. In 2016 she was the first nurse to receive the Australian Museum Eureka Prize for Outstanding Mentor of Young Researchers, the most prestigious research mentorship award in Australia. Dr. Davidson has over 550 publications in Scopus. Her H-Index is 45 (Scopus) and 66 in Google Scholar and i-10 Index is 385 and she has published 32 book chapters. Many of these publications are with students, mentees, clinical collaborators and fellow nurse scientists. Over her career she has received funding as principal investigator from the National Institutes of Health, the National Health & Medical Research Council (NIH Equivalent Australia), Australian Research Council (NSF Equivalent Australia). She also currently serves as the Co-Director of the Enrichment Core for the NINR P30 Promoting Resilience in Persons with Multiple Chronic Conditions Promote Center (PI Szanton) and she is also an advisor to the NINR Funded Palliative Care Research Collaborative (PI Kutner).

Claire Ankuda, MD, is an Assistant Professor in the Department of Geriatrics and Palliative Medicine at the Icahn School of Medicine at Mount Sinai. A Vermonter, she earned an MD from the

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University of Vermont and a MPH from the Harvard School of Public Health before going to the University of Washington for family medicine residency. She was then a Robert Wood Johnson Clinical Scholar at the University of Michigan during which time she conducted a 6-month policy externship at the Center for Medicare & Medicaid Innovation. Following this, she completed a Palliative Medicine fellowship at Mount Sinai. Dr. Ankuda is a health services researcher who aims to assess the impact of payment policies and health systems on outcomes for seriously ill older adults and their families.

Lori Bishop, MHA, BSN, RN is a healthcare nurse executive focused on innovative and transformational interdisciplinary care delivery models for the vulnerable seriously ill population. Lori has an extensive clinical background in hospice and palliative care. Her current position is Vice President of Palliative and Advanced Care at NHPKO. Previously, Lori was the Chief Advanced Illness Management (AIM) Executive for Sutter Health serving an average daily census of 2500 seriously ill patients across Northern California. Under her leadership, the Sutter Health AIM program reduced total program cost by 13% two consecutive years while achieving full performance for quality metrics. In 2017, she restructured the program including widespread implementation of primary palliative care in home health; implemented a standard palliative care patient satisfaction survey through a national vendor; implemented daily huddle, bi-weekly case conference, and monthly care conference leveraging patient level data to drive performance and care coordination. AIM received the inaugural Vanguard Award from the California Hospital Quality Institute in 2016. In her previous executive role at UnityPoint Health, Lori facilitated the creation of a system-wide palliative care program across care settings by developing standard clinical, operational, satisfaction, and financial metrics across sites of service. The system-wide integrated Palliative Care program received the prestigious Circle of Life Award in 2013. The team enhanced and optimized the electronic health record to pull clinical data for metric reporting and shared their build with other Epic users.

Jon Broyles, M.Sc has been the executive director of C-TAC since 2010. He oversees day-to-day operations and sets strategy. Jon has the benefit of drawing on hundreds of innovators' experience and talent in the Coalition. His role is channeling these resources into practical approaches to improve care for those living with advanced illness. Jon received his M.Sc in Philosophy from the University of Edinburgh.

Karen Bullock, PhD, LCSW is Professor and Head of the Department of Social Work at North Carolina State University, in the College of Humanities and Social Sciences. She earned her PhD in Sociology and Social Work from Boston University, her Master's degree in Social Work, from Columbia University, and her Bachelor of Social Work degree from North Carolina State University. She is Affiliate Faculty at the Institute for Collaboration on Health, Intervention, and Policy (InCHIP) at the University of Connecticut. Dr. Bullock has more than 20 years of clinical practice experience in mental health and aging, with interests and expertise in health care disparities and end-of-life care issues. She is a John A. Hartford Faculty Scholar and serves on several national boards and committees, including Social Work Hospice & Palliative Care Network (SWHPN), the American Cancer Society (ACS) Oncology Social Work Research Peer Review Committee, and is current Chair of the NASW Mental Health Section Committee. Dr. Bullock's research focuses on cancer care and social support for older adults with non-curable illnesses. Her article on *The Influence of Culture on End-of-Life Decision Making*, won the 2012 Best Article Award by the Routledge *Journal of Social Work in End-of-Life & Palliative Care*. She has been a leading force in advancing social work

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practice, education, and training in gerontology, mental health, palliative and end-of-life care. In addition, Dr. Bullock he has been quoted in the Washington Post, USA Today and LA Times as an expert in these areas. Dr. Bullock has published and presented nationally and internationally on these topics. She was a Visiting Scholar at the Mailman School of Public Health at Columbia University and previously held appointments at the Institute of Living/Hartford Hospital, the University of Connecticut, Salem State College, Smith College, and UNC-Wilmington.

Deborah J. Cohen, PhD Deborah Cohen, Ph.D., has been developing her skills in qualitative methods for more than 20 years, and has spent more than a decade studying primary care practices, with a focus on clinician-patient communication, practice change and improvement and health information technology use. Dr. Cohen has expertise in a range of qualitative methods and approaches, including interviewing, observation, and conversation analysis. Dr. Cohen is a highly skilled analyst, and she has experience supervising qualitative teams in data collection, management and analysis of qualitative and mixed methods data.

Dr. Cohen uses her qualitative expertise on mixed methods teams to look at how improvements are implemented in primary care practices, to identify what changes are made, and to compare the effectiveness of observed practice change on process and outcomes measures. She has been a Principal Investigator on several federal and foundation funded grants, leading mixed methods teams to understand and tackle the complicated problems related to implementing and disseminating new innovations and important quality improvements in primary care practice. Her work has focused on comparing the effectiveness of approaches for improving preventive services, health behavior and behavioral and mental health care in the primary care setting.

Carole Flamm, MD, is Medical Director for the Office of Clinical Affairs at the Blue Cross and Blue Shield Association (BCBSA), a national federation of 36 independent, locally operated Blue Cross and Blue Shield companies. Dr. Flamm currently provides leadership support to Clinical Content for BCBSA's Evidence Street® including engagement with medical specialty societies and physicians at academic medical centers to manage the Clinical Input process. She also helps to support BCBS Plans with clinical implementation information related to new cellular immunotherapy and gene therapy products. Previously as Executive Medical Director she provided leadership and strategic direction in developing programs to evaluate and improve the quality and value of care experienced by Blue Cross and Blue Shield members, through collaboration with Blue Cross and Blue Shield companies, professional organizations and other key healthcare stakeholders. She has provided clinical leadership for the national Blue Distinction® Programs, including specialty designations that recognize hospitals that demonstrate expertise in delivering quality specialty care and a total care program that recognizes doctors and hospitals participating in locally tailored programs (Patient-Centered Medical Homes, Accountable Care Organizations or similar programs) designed to lower cost trend through better coordinated care. Previously, Dr. Flamm was Associate Director of BCBSA's Technology Evaluation Center (TEC) now called the Center for Clinical Effectiveness, which conducts systematic reviews of medical literature and provides leadership in evidence-based decision-making for new medical technologies. Before joining BCBSA, Dr. Flamm completed a fellowship in clinical epidemiology and health services research at the Brigham and Women's Hospital in Boston. She is board-certified in diagnostic radiology and was an instructor in radiology at Harvard Medical School and an associate in radiology at Beth Israel Hospital in Boston. Dr. Flamm received her medical degree from the University of Pennsylvania and holds a

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Master's degree in public health from Harvard. She completed her undergraduate studies summa cum laude at the University of Virginia.

Ann Greiner, MA serves as President and Chief Executive Officer of the Primary Care Collaborative (PCC) where she is focused on defining and implementing an advocacy, research and education agenda that furthers comprehensive, team-based and patient-centered primary care. Ms. Greiner is a well-recognized leader in the quality field and has worked at a number of prestigious national organizations. Prior to joining the PCC in 2017, she served as Vice President of Public Affairs for the National Quality Forum (NQF) where she increased the visibility and influence of NQF on Capitol Hill. She also served as Deputy Director at the National Academies of Medicine, contributing to the Quality Chasm series of reports and related conferences. Ms. Greiner has also held leadership positions at NCQA and the American Board of Internal Medicine. She has a master's degree in Urban Planning from the Massachusetts Institute of Technology and a Bachelor of Arts degree in English Literature from Hobart and William Smith Colleges.

Rebecca Kirch, JD, is Executive Vice President of Healthcare Quality and Value for the National Patient Advocate Foundation (NPAF), the advocacy affiliate of the Patient Advocate Foundation (PAF). In this role, she provides strategic focus and leadership in bringing the millions of patient and family voices these two organizations represent to the forefront of national health care quality improvement efforts. Rebecca joined NPAF in April 2016, previously serving 15 years with the American Cancer Society and its advocacy affiliate, the American Cancer Society Cancer Action Network (ACS CAN). As a leading health policy expert and advocate in her field, Rebecca is dedicated to improving quality of life and the quality of care for all adults, children and families confronting serious illness. She has authored numerous article and book chapters addressing priorities of person-centered care and quality improvement practices that promote skilled communication and goal-directed care, with particular emphasis on integrating palliative, psychosocial, and rehabilitation services with disease-directed treatment. Rebecca also played a leading role in planning and executing the Institute of Medicine and American Cancer Society 2015 joint workshop on "Comprehensive Cancer Care for Children and Families."

Lars Peterson, MD, PhD is a family physician and health services researcher who serves as Vice President of Research for the American Board of Family Medicine (ABFM). He also has an appointment as an Associate Professor in the Department of Family and Community Medicine at the University of Kentucky, where he provides direct clinical care and teaches students and residents. Dr. Peterson, a native of Utah, received his medical and graduate degrees from Case Western Reserve University in Cleveland, Ohio and completed his family medicine residency at the Trident/Medical University of South Carolina family medicine residency program. Dr. Peterson leads a research team focused on elucidating the outcomes of Family Medicine Certification, in particular the impact that certification activities have on the quality of care delivered by family physicians. Additionally, Dr. Peterson and his team seeks to understand the ecology of family medicine over time—what physicians do in practice and their contribution to high quality health care. His personal research interests also include investigating associations between area level measures of health care and socioeconomic with both health and access to health care, rural health, primary care, and comprehensiveness of primary care. Dr. Peterson has authored over 100 peer reviewed publications and made over 100 national / international conference presentations.

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Tammie Quest, MD, is the Director of the Emory Palliative Care Center for Emory's Woodruff Health Sciences Center. She is Professor in the Department of Emergency Medicine, and Division of Geriatrics and Gerontology at the Emory University School of Medicine and board certified in Emergency Medicine and Hospice and Palliative Medicine. Dr. Quest is a Project on Death in America Faculty Scholar. Currently, she serves as the Chief of the Section of Palliative Medicine at the Atlanta VA Medical Center and is the former director of the Grady Cancer Center for Excellence Palliative Care Oncology Program. She is currently the Fellowship Program Director for the Emory University School of Medicine program in Hospice and Palliative Medicine and holds a strong interest in novel palliative care curriculum design and teaching methodologies for both undergraduate, graduate and post-graduate medical trainees that she teaches locally, regionally and nationally. Dr. Quest is the Director of the NCI sponsored Education in Palliative and End of Life Care—Emergency Medicine (EPEC-EM) Project. She serves as a member of the National Priorities Partnership's Palliative and End-of-life Care work group. With a strong interest in ethics and end of life care, she holds a core faculty appointment at the Emory University Center for Ethics and she is the immediate past-Chair of the Ethics Committee for the Society of Academic Emergency Medicine and a member of the ethics committee for the American College of Emergency Physicians. In 2016, she was appointed by Governor Nathan Deal to the Georgia Palliative Care and Quality of Life Advisory Council. She is also president-elect of the American Academy of Hospice and Palliative Medicine.