

CURRICULUM VITAE

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Director,
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Revised: August, 2013

EDUCATION:

<u>Dates Attended</u>	<u>Institution and Location</u>	<u>Degrees Conferred</u>	<u>Major Subject</u>
1968-70	St. Louis University, St. Louis, MO	BA, magna cum laude	Philosophy, Sociology
1970-72	University of Connecticut, W. Hartford, CT	MSW	Community Organization, Administration
1975-78	University of Wisconsin, Madison, WI	Ph.D., Social	Social Welfare Planning, Gerontology Administration Org. Theory
1978	State of Connecticut Dept. on Aging Hartford, CT	Post-doctoral Fellow	Gerontological Society of America's Research Fellowship in Applied Gerontology Program
2000	John F. Kennedy School of Government, Harvard University Cambridge, MA	Certificate	Strategies for Enhancing Executive Influence
2000	The Program on Negotiation Inter-University Consortium Harvard Law School Cambridge, MA	Certificate	The Program on Negotiation for Senior Executives

PRINCIPAL POSITIONS HELD:

1973-75	Town of Mansfield, Mansfield, CT	Director of Social Services
1976-68	Community Care Evaluation Project Madison, WI	Research Specialist
1978-87	State of Connecticut Dept. on Aging Hartford, CT	Chief of Research and Program Development

1987-92	State of Connecticut Office of Policy and Management, Hartford, CT	Project Director, Connecticut Partnership for Long-Term Care
1992-95	State of California Dept. of Health Services, Sacramento, CA	Project Director, California Partnership for Long-Term Care
1992-95	School of Nursing University of California, San Francisco	Associate Adjunct Professor, Step 2
1995-99	Center on Aging University of Maryland, College Park	National Project Director Cash & Counseling Demonstration & Evaluation
1999-2009	Boston College	National Program Director Cash & Counseling Director, Center for the Study of Home and Community Life
1999-Present	Boston College Graduate School of Social Work	Professor
2009 -Present	Boston College National Resource Center for Participant-Directed Services	Director

ANCILLARY POSITIONS HELD:

1985-92	Dept. of Community Medicine and Health Care, School of Medicine University of Connecticut, Farmington	Assistant Clinical Professor
1991-93	Dept. of Epidemiology and Public Health School of Medicine Yale University, New Haven, CT	Lecturer
1999-2006	Center on Aging University of Maryland College Park, MD	Special Membership Graduate Faculty Adjunct Associate Professor

HONORS AND AWARDS:

1976	Outstanding Student Paper Award for Social Research, Planning and Practice Section of the Gerontological Society of America
1984	State of Connecticut Distinguished Managerial Service Award
1985	Fellow, Gerontological Society of America
2000	Joan Quinn Award for Leadership in Long-Term Care and Aging Presented by Connecticut Community Care, Inc. with Citations from Governor Rowland and the Connecticut General Assembly

2004	Named an Honorary Kentucky Colonel by Governor Fletcher and the Kentucky Legislature
2004	Selected to receive the 2004 Maxwell A. Pollack Award (for research affecting programs and policy), Gerontological Society of America
2007	Awarded the James E. Flynn Prize for Social Work Research
2012	Fellow, American Academy of Social Work and Social Welfare

MEMBERSHIP IN PROFESSIONAL ORGANIZATIONS:

1975-Present	Gerontological Society of America
1988-1991	National Association of Social Workers
1999-Present	American Society on Aging American Public Health Association
2009-Present	Council on Social Work Education
2012-Present	American Academy of Social Work & Social Welfare

PROFESSIONAL ACTIVITY:

Professional Organization Activities:

1981-87	Medicaid Advisory Committee State of Connecticut	Member
1981-87	Coordinating Commission on Long-Term Care State of Connecticut	Member
1982-87	Negotiated Investment Strategy (NIS) for allocating State of CT Social Services Block Grant funding	Bargaining Team Representative
1984-86	Research, Education and Practice Committee Gerontological Society of America	Member
1985-87	Advisory Board on Aging and the Humanities State of CT, Department on Aging	Member
1986-89	Research Fellowship Program Gerontological Society of America	Steering Committee Member
1986-87	Student Awards Committee Social Research, Planning & Practice Section Gerontological Society of America	Chair
1988-1991	Aging Subcommittee National Association of Social Workers	Member
1988-1990	Public Policy Committee	Member

	Gerontological Society of America	
1991-92	Program Committee, Social Research, Planning and Practice Section, Gerontological Society of America	Chair
1991-94	Council, Gerontological Society of America	Executive Committee Member
1992-93	Gerontological Society of America	Vice President and Chair of the Social Research, Policy and Practice Section
1992-93	Office of the Assistant Secretary for Planning and Evaluation, DHHS	Advisory Panel Member on "The Federal Role in Supporting Case Mgmt."
1996	Local Arrangements Committee Annual Meeting, Gerontological Society of America	Co-Chair
1998-2003	Technical Advisory Group World Institute on Disability	Member
1998-2003	Program Committee for Annual Meeting Social Research, Policy and Practice Section Gerontological Society of America	Member
2005-08	Gerontological Society of America	Secretary
2009-Present	Council on Social Work Education	Member
2010	Journal of Care Management Editorial Review Board	Member
2010-Present	University of California, San Francisco, Online Caregiver Training	Advisory Board Member
2011-Present	AARP Public Policy Institute "State Report Card on Long Term Services and Supports"	Advisory Board Member
2012-Present	Amerigroup	Advisory Board Member
2012-Present	AARP Health Products Quality Review Committee	Consumer Advocate Advisor

Service to Professional Publications

1989-Present	<i>Hong Kong Journal of Social Work</i>	International Reviewer
1991-Present	<i>Journal of Case Management</i>	Editorial Advisory Board
1992-94	<i>The Gerontologist</i>	Consultant to the Editor on Social Research, Policy and Practice
2004-07	<i>The Gerontologist</i>	Editorial Advisory Board

2004-Present	<i>Home Health Care Services Quarterly</i>	Editorial Board
Ongoing	<i>Journal of Aging and Social Policy, and Health Affairs</i>	Reviewer
Consultation:		
1979	Farmington (CT) Valley Community Health Care Agencies	Feasibility of Merger
1979	Wisconsin Community Care Organization	Program Evaluation
1982	North Central Connecticut Health Systems Agency	Special Certificate of Need Review Panel on Life Care Facilities
1984	State of Iowa	Community Care Cost Containment
1987	State of Florida	Community Care Development
1990	State of Hawaii	Long-Term Care Financing
1995	State of Florida Commission on Long-Term Care	Public/Private Partnership for Funding Long-Term Care
1996	Office of Public Management, Great Britain	Public/Private Partnership to Finance Long-Term Care
1998	University of California, Berkeley Center for Advanced Study of Aging Services	Care Management and Private Long Term Care Insurance
2001	State of South Carolina Medicaid Agency and of Alzheimer's Disease Registry Group	Consumer Direction HCBS
2001	State of Nebraska Department of Education	Consumer Direction of HCBS
Other Professional Service		
1981	Travelers Insurance Companies Older Americans Program	Grant Reviewer
1981-87	Research Committee Connecticut Community Care, Inc.	Member
1988-2002	AARP-Andrus Foundation	Grant Reviewer
1992-95	Center for Health Care Access and Reform's	Policy Advisor

Model Legislation Project

1994-95	State of California Health and Welfare Agency's Long-Term Care Work Group (analyzing the impact of proposed national health reforms)	Chair
1999	George Washington University and Robert Wood Johnson Foundation's "Health Insurance Reform Project"	Policy Expert
2000	Miami University/Scripps Gerontology Center Planning Committee for Regional Consumer Direction Conference	Advisory Council Member
2003-05	National Council on the Aging's "Reverse Annuity Mortgage/Home Equity Conversion" Demonstration	Advisory Expert Panel Board
2003-05	National Association of State Units on Aging's "Consumer Direction" Project	Advisory Committee
2007	AoA Nursing Home Diversion Modernization Grant	Review Committee
2009	Alzheimer's Disease Supportive Services Program (ADSSP) FY2009 Grants	Reviewer
2009	Community Living Program (CLP) FY2009 Grants	Reviewer
2013	Administration for Community Creating and Sustaining Dementia Capable Service System Grants FY2013	Reviewer
2013	Long Term Care Commission	Advisory Committee
2013	College of Personal Assistance and Caregiving (CPAC), Center for Personal Assistance Services	Advisory Committee

SCIENTIFIC AND PROFESSIONAL MEETINGS AND WORKSHOPS ATTENDED (Partial Listing):

International:

International Conference on Long-Term Care Case Management, 1992 (research paper, did not present), 1996 (symposium speaker), 1998 (invited speaker)

International Conference on Family Care, October 12-14, 2002, Washington, DC (symposium presenter)

International Care Management Conference, Philadelphia, PA., led four-hour mini-course on "Managing Quality in Consumer –Directed Program Environment." 2003

International Social Welfare Practice Research Symposium, 2005 (presenter)

International Symposium: "New Aging – Emerging Issues and Challenges for the Aging Societies in the 21st Century." Sponsored by the Japan Foundation Center for Global Partnership. 2001 (invited speaker) Tokyo; (invited panelist) Fukuoka. Topic: Innovations in Long-Term Care.

Cadenza Symposium: "Preparing for an Elder Friendly Hong Kong," 2007 (two presentations)

World Conference of Social Work: "Consumer Direction, Personal Care, and Well-Being for Medicaid Beneficiaries with Mental Health Diagnoses: Lessons from Cash & Counseling", Brazil, August 2008

Personal Health Budget Policy Seminar, London, September 24-25, 2008 (invited speaker)

International Conference on Self-Determination Presentation: "Got Participants?" May, 2009

National:

AcademyHealth Annual Research Meeting, 2005 (presenter)

Administration on Aging's Choices for Independence: National Leadership Summit, 2006 (presenter)

AFAR/John A. Hartford Foundation Communications and Dissemination Conference, 2005 (presenter)

Alliance for Health Reform Congressional Briefing, 2005 (presenter)

Alzheimer's Association's National Legislative Training Meetings, 1996 (invited speaker)

American Association of Homes for the Aging Annual Meeting, 1993 (invited presentation)

American Public Health Association, 1990 (invited paper, co-authored research paper - did not present), 1992 (co-authored research paper - did not present), 1998 (symposium presenter), 2002 (paper)

American Public Welfare Association's National Conference on Research, Demonstration and Evaluation in Human Services, 1989 (research paper)

American Society on Aging, 1994 (workshop organizer and speaker, and special program moderator and panelist), 1997 (symposium speaker), 2003 (Co-Chaired and presented symposium), 2005 (presenter)

Association of State Units on Aging and the National Council on the Aging, 2005 (presenter)

CMS and AoA Regional Offices New Freedom Initiative Grantee Teleconference, 2005 (invited presenter)

Council on Social Work Education, 1979 (co-authored research paper), 2003 (poster presenter), 2008 (co-author)

Commitment to Justice in Jesuit Higher Education Conference, 2005 (presenter)

Evaluation Research Society, 1978 (co-authored research paper, did not present)

Gero-Ed Forum: Infusing Gerontology Across the Classroom and Field, 2007 (presenter)

Gerontological Society of America, 1976 (research paper), 1977 (research paper), 1978 (research paper, poster and co-authored research paper), 1979 (discussion paper), 1980 (co-authored research paper, symposium presentation), 1981, 1982 (co-authored research paper), 1983 (poster), 1984, 1985 (thematic round table moderator and presenter), 1986 (poster, thematic round table moderator and presenter), 1987 (discussion paper), 1988 (symposium moderator and speaker), 1989 (two co-authored papers, co-authored poster, and symposium moderator and speaker), 1990 (symposium speaker), 1991 (symposium moderator and speaker, and discussant), 1992 (symposium speaker), 1993 (discussant), 1995 (pre-conference workshop speaker and symposium speaker), 1996 (two co-authored research papers), 1997 (presented at two symposia, and discussant in paper session), 1998 (post conference workshop), 1999 (presented at two symposia), 2000

(symposium organizer and presenter; poster session chair), 2001 (two poster presentations; symposium presenter), 2002 (symposium moderator and discussant), 2003 (chaired and presented at two symposia and presented two research papers), 2004 (presented at two symposia), 2005 (presented at five symposia, one presentation at The Maxwell A. Pollack Award for Productive Aging Lecture Chairs), 2006 (presenter), 2007 (presenter, facilitator), 2008 (session chair, symposium), 2009 (presenter)

ILRU Webcast Teleconference, 2005 (invited presenter)

Home and Community-Based Services Waiver Conference, 1997 (two symposium presentations), 1999 (two symposium presentations), 2000 (moderated one and presented at two symposia), 2001 (moderated two symposia), 2002 (symposium moderator and presenter), 2005 (co-lead pre-conference ½ day session and presenter), 2006 (three presentations), 2008 (two presentations, two posters, invited speaker at NASUA pre-session), 2013 (invited presenter)

LIFE Account Grantee Workshop, 2005 (presenter)

Long-Term Care Commission, 2013 (presenter)

National Association of State Units on Aging, 2008 (workshop/symposium)

National Association of Social Workers, 1989 (master class organized and co-presented)

National Chronic Care Consortium, 1997 (presented at Annual Meeting and again at Annual Program Staff Meeting)

National Conference on Independent Living, 1998 (presenter)

National Council on Aging, 1993 (symposium presentation), 1998 (roundtable and symposium presenter), 2005 (presenter)

National Institute on Social Work in Rural Areas, 1977 (co-authored research paper), 1980 (co-authored research paper)

National Leadership Summit on Self-Determination and Consumer-Direction, 1999 (invited participant)

New Freedom Initiative Conference, 2007 (poster presentation)

Private Long-Term Care Insurance Conference, 1989 (symposium paper), 1990, 1992 (invited address), 1995 (symposium speaker), 2000 (presenter), 2004 (symposium speaker)

System Change Conference (Center for Medicare and Medicaid Services), 2002 (workshop organizer and presenter), 2003 (two poster sessions), 2004 (presenter), 2005 (presenter)

Western Gerontological Society (now American Society on Aging), 1980 (poster, did not present), 1981 (symposium presentation)

Regional:

American Public Welfare Association (Northeast Regional Training Conference), 1980 (co-led workshop)

Arc of New Mexico Conference, 2006 (presenter)

Case Management Society of America, Northern California Chapter, 1993 (co-authored research paper)

Connecticut Human Services Conference, 1988 (research paper)

Connecticut Social Welfare Conference, 1981 (invited paper)

Connecticut Society of Gerontology and Connecticut Coalition on Aging, 1979 (invited research paper), 1983 (keynote address), 1991 (keynote address)

Iowa Credit Union Conference: Discovering Untapped Markets, 2007 (invited panelist)

6th Massachusetts Elder Affairs Conference, 2005 (invited presenter)

Massachusetts Home Care Retreat, 2006 (presenter)

Massachusetts Gerontological Society, 1999 (invited panelist at Annual Meeting), 2000 (moderator and presenter at Fall Public Policy Forum), 2004 (presenter at Annual Policy Forum), 2013

Massachusetts Home Care's Aging Network Conference, 2004

Michigan Self-Determination Conference, 2005 (invited presenter, plenary session, workshop)

Minnesota Self-Directed Services Advocacy Group Conference Call, 2007 (invited presenter)

Miami University – Scripps Gerontology Center Regional Conference on "Older Consumers in Long-Term Care: Satisfaction, Self-Direction and Education, 2001 (presenter)

National Association of Budget Officer's (Eastern Regional Conference), 1988 (research paper)

Northeastern Gerontological Society, 1982 (co-authored two research papers), 1984 (co-authored research paper, did not present), 1985 (co-authored paper, did not present and organized symposium), 1986 (co-authored paper)

Northern California Gerontology and Geriatrics Research Conference, 1993 (research paper)

Pennsylvania's Governor's Office of Health Care Reform and Commonwealth Long-Term Living Reform Project: A Focus on Cash & Counseling, 2005 (invited presenter)

Pride Institute Annual Conference, 1991 (invited paper)

INVITED PAPERS, LECTURES AND PRESENTATIONS:

1978 Medical College of Wisconsin's Workshop on Aging for Primary Care Physicians and Psychiatrists (co-authored invited paper)

1979 Connecticut's Medicare Coordinating Council (invited research paper)

1980 Symposium on Advocacy for the 80's (invited workshop)

1988 New England Association of Homes for the Aging (invited paper)

1989 Greater Hartford Chamber of Commerce (invited paper)

1990 Connecticut Chapter of the American College of Health Care Administrators (invited paper)

1990 Connecticut Bar Association (invited paper)

1990 Connecticut Association for Home Care (invited paper)

1990 Institute for International Research (invited paper)

1991 Pharmaceutical Association's New England Health Care Leadership International Conference (invited paper)

1991 Connecticut Association of Senior Center Personnel (workshop)

1991 Alzheimer Coalition of Connecticut (invited paper)

1991 State of California Long-Term Care Insurance Advisory Group (workshop)

1992 Life Insurance Marketing and Research Association (invited paper)

1992 Massachusetts Rate Setting Commission (invited workshop)

1992 National Health Policy Forum (invited paper)

1992 Connecticut Association of Non-Profit Facilities for the Aged (invited paper)

1992 Health Insurance Association of America (invited paper)

1992 Connecticut Association of Home Health Agencies (invited paper)

1992 Connecticut Chapter of the International Association of Financial Planners (invited paper)

1992 Faulkner and Gray's Health Policy Forum (invited address)

1992 Medi-Cal Managers' Meeting (invited presentation)

1992 Health Insurance Counseling and Advocacy (HICAP) Program Quarterly

1993 Training Meetings (invited workshops)

1993 California Alzheimer's and Related Disorder Advisory Committee (invited presentation)

1993 Kaiser Health Plan's; "Long Term Care Task Force" - (invited workshop)

1993 California Association of Health Services at Home, Annual Legislative Meeting (invited paper)

1993 California Hospital Association - Long Term Care Committee (invited presentation)

1993 American Academy on Aging (invited paper)

1993 California Long-Term Care Coalition (invited presentation)

1993 Huntington Hospital, Pasadena, Ca. (full day seminar on the Role of Care Management in the CA Partnership for Long-Term Care)

1993 Family Caregiver Alliance Annual Meeting (invited paper)

1993 California Association of Health Services at Home Annual Meeting (invited paper)

1993 Office of Public Management – London, England (two lectures)

- 1999 Wisconsin Partnership Program Annual Meeting (invited presentation for state home care program)
- 1999 Community Alternative Systems Agencies of New York State (featured presentation for state home care program)
- 1999 Long-Term Care Discussion Group (invited presentation to ad hoc seminar for Washington-based advocacy, government and industry representatives)
- 1999 Briefing for U.S. Department of Health and Human Services on the Implementation of the Cash and Counseling Demonstration and Evaluation
- 1999 Separate Briefings for the Arkansas, Florida and New Jersey Congressional Delegations on the Implementation of the Cash and Counseling Demonstration and Evaluation (organizer and presenter)
- 1999 Jesuit Institute on Ethics and Aging Seminar, Boston College (presenter)
- 2000 Connecticut Commission on Aging Annual Meeting (keynote speaker)
- 2000 Florida Elder Leadership Institute (moderator and presenter)
- 2000 National Long-Term Care Awareness Conference (presenter)
- 2001 Somerville-Cambridge Elder Services, Board of Director's Meeting (presenter)
- 2001 Scripps Gerontology Center of Miami University's 4th Long Term Care Conference, Columbus, OH (presenter)
- 2002 Ithaca College Gerontology Institute/Annual Spring Conference. Ithaca, NY (lecturer)
- 2002 Robert Wood Johnson Foundation's Supportive Services Program Management Team (presenter)
- 2002 Boston College's Initiatives on Aging Program (Colloquia)
- 2003 Regional Symposium for states interested in replicating Cash and Counseling approach, Raleigh, NC (convened and chaired)
- 2003 Self Determination for the Persons with Developmental Disabilities. Las Vegas, NV. (Keynote Speaker and panel presentation)
- 2003 Briefing on Effects of Cash and Counseling on Quality of Care for AR Congressional Delegation
- 2003 The Leadership Council. Memphis, TN. (two breakout sessions)
- 2003 Substance Abuse and Mental Health Services Administration (SAMSHA) Self- Determination Initiative Planning Meeting, College Park, MD. (presenter and panelist)
- 2003 "Self-Determination Event" sponsored by the ARC of Kentucky and the Kentucky Council on Developmental Disabilities, Lexington, KY (presenter) (also, testified before legislative committee and before state task force, and gave keynote address at conference)

- 2003 New Hampshire Real Choice Systems Change Conference, Manchester, NH. (keynote speaker)
- 2003 "Successes in Systems Change Regional Symposium" and Annual Arkansas Aging Network Conference, Little Rock, AR. (presenter)
- 2003 "Re-Balancing Long-Term Care in the State of Iowa" Des Moines, Iowa (keynote speaker)
- 2003 Second Annual San Diego, CA. Conference on Self-Determination and Individualized Funding, (presenter)
- 2004 Briefing for Arkansas Congressional Delegation and staff on the cost and access to care results from Cash and Counseling Demonstration and Evaluation
- 2004 CN8 TV half hour show on Consumer Directed Care following up on Wall Street Journal article.
- 2004 Federal Interagency Committee on Disability Research, results from Cash and Counseling Demonstration (presenter)
- 2004 "Choice and Human Services" for the Boston College Jesuit Institute on Aging and Ethics (presenter)
- 2004 Substance Abuse and Mental Health Services (SAMHSA) Consumer Direction Summit (participant)
- 2004 National Association State Units on Aging/National Council on the Aging, presentation on the Expansion of the Cash and Counseling Demonstration
- 2004 University of Wisconsin, Madison. Seminar on Research from Cash and Counseling
- 2004 Speech on Research Affecting Public Policy at the Robert Wood Johnson Foundation Annual Meeting of National Program Directors
- 2004 "Setting the Stage for Expansion" Cash and Counseling Annual Meeting
- 2004 Congressional Briefing for the Staff of the Senators and Representatives of the 14 Cash and Counseling States
- 2004 Briefings for Senate Finance, Senate Health, and House Energy and Commerce Health Subcommittee Staff on latest research results from Cash and Counseling
- 2005 Gerontological Society of America Annual Meeting: Pollack Award Recipient at the Maxwell A. Pollack Award for Productive Aging Lecture Chairs
- 2006 Boston College School of Nursing PhD Colloquia, Panel: Challenges in Contemporary Health Care
- 2007 A Celebration of the Heart: Acceptance Speech for Flynn Award
- 2007 Sarnat Endowed Lecture
- 2007 Boston University Geriatric Services Conferences
- 2007 Hartford Faculty Scholars and Doctoral Fellows Programs Leadership Conference

- 2008 Mathematica Policy Research Disability Forum, Presentation: *Lessons from the Cash & Counseling Replication in 12 States*
- 2009 AoA and VA Nursing Home Diversion Meeting, "Setting the Stage for Veterans-Directed Home and Community-Based Services (VDHCBS): Participant-Direction".
- 2009 AoA and VA Nursing Home Diversion Meeting, Co-led 2 breakout sessions, "VDHCBS Program Elements".
- 2009 Alzheimer's Disease Supportive Service Program Grantee & Partner Teleconference, Presentation: Cash & Counseling.
- 2009 Self-Determination Wisconsin meeting with Employment Resources, Inc., Presentation: "Managed Care Self-Directed Supports Forum"
- 2009 National Council on Independent Living (NCIL) Annual Meeting, Poster Session : "Cash & Counseling: Lessons Learned Inform the Development of a New Training Center"
- 2009 South Eastern Area Agency on Aging Board of Directors Meeting, Presentation, "Participant Direction: What, Why and How?"
- 2009 Public Partnership Retreat, Panelist, "The Future of Consumer Direction for Persons with Disabilities Served by State Agencies".
- 2009 Eisenhower Strategy Forum, Presentation, "Participant Direction: What, Why and How?"
- 2009 Consumer Directed Personal Assistance Association of New York State's Annual Conference, Keynote Address, "The Many Faces of Consumer Direction".
- 2009 Financial Management Services Conference, Moderator, "Unionization in Participant Direction Programs: Impact on State and Financial Management Services Operations".
- 2010 AoA/VA Grantee National Meeting, "Resources for VAMC and VISN Implementation of VDHCBS", February 22, 2010.
- 2010 AARP Public Policy Institute CLASS Roundtable, "Overcoming Obstacles to Consumer Participation: Lessons from Cash & Counseling," June 15, 2010, Washington, DC
- 2010 International Conference on Evidence-based Policy in Long-Term Care, "The Reach, Effectiveness, Adoption, Implementation, and Maintenance of Participant-Directed Care in the USA," September 9, 2010, London, U.K.
- 2011 64th Annual Scientific Meeting, "Multi-state Survey of Support Broker/Planners in Participant-Directed Services Programs," Gerontological Society of America, Boston, MA. (November 21, 2011).
- 2011 The Crossroads of Research, Policy and Practice: To Improve the Lives of Older Adults, "Cash & Counseling: Spreading an Innovation," NCOA & GSA, Boston, MA. (November 21, 2011).
- 2011 Lessons for CLASS - What Existing Public Programs Can Teach Us (a symposium consisting of three unique presentations two of which were co-authored by Kevin J. Mahoney, Ph.D.), "Cash Benefits for LTSS in Europe -- Issues and Options," " How did Cash & Counseling Participants

- Spend Their Budgets, and Why Does that Matter for the CLASS Act?" and "Getting Purchasing Power into the Hands of Participants: Lessons from Participant Direction Programs," Gerontological Society of America's 64th Annual Scientific Meeting, Boston, MA. (November 20, 2011).
- 2011 64th Annual Scientific Meeting, "Cash for Care in Europe - Implications for CLASS," Gerontological Society of America, Boston, MA. (November 19, 2011).
- 2011 How the Lack of a Trained Workforce Threatens the Future Expansion of Participant-Directed LTSS Programs (a symposium consisting of three unique presentations for which Kevin J. Mahoney, Ph.D., was a discussant in addition to co-chair), "National Inventory of Publically Funded Participant-Directed Services Programs," "State Interviews Reveal Cash & Counseling Information and Training Needs During Budget Austerity," and "Representatives for People with Dementia in a Participant-Directed Program: Unique Training Needs," Gerontological Society of America's 64th Annual Scientific Meeting, Boston, MA. (November 19, 2011).
- 2011 "Guiding Principles" Signing Ceremony Speech, Service Employees International Union, Washington, DC. (November 16, 2011).
- 2011 Financial Management Services Conference Keynote Opening Presentation, NRCPPDS, Baltimore, MD. (November 14, 2011).
- 2011 "A experiencia dos imigrantes Brasileiros nos EUA, o Servico Social e a Universidade de Boston," Departamento de Servico Social, Rio de Janeiro, Brazil. (September 22, 2011).
- 2011 BC GSSW 75th Anniversary, "Power of Social Innovation," Boston College, Boston College Chestnut Hill Campus. (September 14, 2011).
- 2011 Mahoney, K., Geriatric Education Conference Series, "Cash & Counseling: Spreading An Innovation," Boston University School of Medicine, Boston, MA. (July 22, 2011).
- 2011 Practice Change Fellows Meeting, "Cash & Counseling: Spreading An Innovation," University of Colorado Denver, Division of Health Care Policy and Research, Boston, MA. (May 19, 2011).
- 2011 The SCAN Foundation Policy Roundtable: Aging with Dignity and Independence in the Era of CLASS, "Policy Roundtable Webinar #1: How the CLASS Benefit Could Be Used by Consumers," The SCAN Foundation. (May 11, 2011).
- 2011 GSSW Faculty Meeting, "The National Resource Center for Participant-Directed Services: History, Activities and Import for the GSSW," BC GSSW, Boston College Chestnut Hill Campus. (May 9, 2011).
- 2012 RWJF Connect eTraining Series: Policymaker Outreach, "Leveraging the Media to Gain Policymaker Support," Robert Wood Johnson Foundation, Internet Webinar. (December 14, 2012).
- 2012 Gerontological Society of America Annual Meeting, "Emerging Settings for Participant-Directed Services: Exploring Veterans' Services, Managed Care, and Behavioral Health Programs," Gerontological Society of America, San Diego, CA. (November 17, 2012).
- 2012 Gerontological Society of America Annual Meeting, "Emerging Settings for Participant-Directed Services: Exploring Veterans' Services, Managed Care, and Behavioral Health Programs," Gerontological Society of America, San Diego, CA. (November 17, 2012).
- 2012 Gerontological Society of America Annual Meeting, "Environmental Scan of Self-Direction in

- Behavioral Health," Gerontological Society of America, San Diego, CA. (November 17, 2012).
- 2012 Gerontological Society of America Annual Meeting, "How Do the Experiences of Program Coordinators Support Sustainability of Veteran Directed HCBS?," Gerontological Society of America, San Diego, CA. (November 17, 2012).
- 2012 Gerontological Society of America Annual Meeting, "Participant-Directed Options in Managed Long-Term Services and Supports," Gerontological Society of America, San Diego, CA. (November 17, 2012).
- 2012 Gerontological Society of America Annual Meeting, "Veterans Home and Community-Based Services: Lessons Learned from a Sustainability Study," Gerontological Society of America, San Diego, CA. (November 16, 2012).
- 2012 Gerontological Society of America (GSA), "Understanding Saving and Purchase Patterns of Consumers in a Self-Directed Care Program: The of the West Virginia Participant-Directed Goods and Services Program (PDGS)," GSA, San Diego. (November 15, 2012).
- 2012 GSSW Diversity Event—'Living with Disabilities: Lessons for Social Workers', "'Living with Disabilities: Lessons for Social Workers'," GSSW. (September 10, 2012).
- 2012 Massachusetts's Gerontological Association Annual Meeting: Invisible Faces of Ageism, "Cash & Counseling: "Spreading an Innovation"," The Heller School, Brandeis. (May 15, 2012).
- 2012 Spanish Delegation Presentation, "Cash & Counseling: Spreading an Innovation," GSSW. (May 8, 2012).
- 2012 "The Bible Tells Me So" Movie Viewing & Panel Discussion, "Spirituality and Religion in the Lives of the LGBTQ Community," Spectrum & Spirituality and Social Work Committee, Boston College. (April 11, 2012).
- 2012 GLBTQ Leadership Council's Gala, GLBTQ Leadership Council, Boston. (March 31, 2012).
- 2012 Forum on Participant-Directed Services & Care, Providers' Council, Framingham, MA. (March 20, 2012).
- 2012 "How and Why Cash & Counseling Impacted Public Policy." (March 13, 2012).
- 2012 A Breakthrough Model for Independence and Choice: Self Direction & Behavioral Health, Internet Webinar. (February 28, 2012).
- 2012 GSSW Diversity Day, "GSSW DIVERSITY DISCUSSION: "GAY RIGHTS AS HUMAN RIGHTS"," GSSW Diversity Committee, Global Practice Concentration and GSSW Spectrum, BC Cushing 331. (January 26, 2012).
- 2012 National Advisory and Technical Advisory Panels, AARP, Washington, DC. (January 12, 2012).
- 2012 National Advisory and Technical Advisory Panels, AARP, Washington, DC. (January 11, 2012).
- 2012 Connect Webinar #3: Leveraging the Media to Gain Policymaker Support, RWJF, virtual. (December 14, 2012).
- 2013 Roundtable discussion on Personal Care Services, CMS, Baltimore, MD. (April 19, 2013).
- 2013 ANCOR Conference: Because We All Matter, "Pre-conference: Person Directed Services"

Washington, DC. (April 28, 2013)

- 2013 eTeaching Day, "Online Education as a Tool to Link Jesuit Universities Across the Americas," BC Fulton 245. (May 15, 2013).
- 2013 DAV Briefing on Veteran Directed Care Initiatives to VSOs, Washington, DC. (May 22, 2013).
- 2013 Separate briefings for the House Appropriations Committee, House Committee on Veterans' Affairs, Veterans of Foreign Wars of the U.S., and Senate Committee on Veterans' Affairs, on VD-HCBS. Washington, DC. (June 17, 2013).
- 2013 Briefing for Roscoe Butler of American Legion on VD-HCBS, Washington DC. (July 18, 2013).
- 2013 Separate briefings for Senate MilCon of VA Apparitions and Carl Blake of Paralyzed Veterans of America on VD-HCBS, Washington, DC. (July 19, 2013).
- 2013 Separate briefings of Janet Forlini, Senate Committee on Aging, Alex Nicholson, Iraq and Afghanistan Veterans of America, Ralph Ibson, Wounded Warrior Project, and Tom Edes, Geriatrics and Extended Care Strategic Healthcare Group, Department of Veterans Affairs, Washington, DC. (August 1, 2013).
- 2013 AARP Public Policy Institute discussion of our planned update to the Long-Term Services and Supports Scorecard, Washington, DC. (August 12, 2013).
- 2013 John A. Hartford Foundation and The Gerontological Society of America roundtable discussion on Patient-Centered Medical Homes for older adults, Washington, DC. (August 19-20, 2013).

UNIVERSITY SERVICE

- 1972 Dean's Search Committee
University of Connecticut School of Social Work
- 1977-78 Community Services Advisory Committee Member
Faye McBeath Institute on Aging and Adult Life, University of Wisconsin- Madison
- 1985-87 Gerontological Studies Unit, Travelers Center on Aging University of Connecticut Health Center (1 of 4 steering committee members)
- 1992-95 Investigator, The Claude D. Pepper Older Americans' Independence Center (National Institute on Aging Grant #P60-AG10469) Department of Internal Medicine, Yale University School of Medicine
- 1993 Advisory Committee Member, University of California – Berkeley's Center For Health Services Research
- 1994-95 Advisory Committee Member, University of California – Davis' Center on Aging and Health
- 1999-Present Doctoral, Research/Publication, and Faculty Development Committees Boston College Graduate School of Social Work
- 1999-Present Jesuit Institute on Aging and Ethics at Boston College
- 1999-Present Ad Hoc Committee to Draft Proposal for a Center on Aging and Ethics at Boston College

1999	Steering Committee: Aging and Ethics Conference Series – developing a proposal for the National Institutes of Health
2001-Present	University Committee on Responsible Conduct of Research, Boston College
2001-Present	Boston College GSSW Doctoral Committee, Member
2001-02	Boston College GSSW Associate Dean Search Committee, Member
2002-Present	Boston College GSSW Faculty Search Committee, Member (Co-chaired in 2003/4)
2002-Present	Boston College GSSW International Committee, Member
2002	Boston College GSSW Ad Hoc Committee to sort out whether appropriate procedures were followed in Executive Committee Meetings dealing with proposed new COPPA course, Member
2002-04	Boston College GSSW Steering Committee for John A. Hartford Geriatric Enrichment Program
2002-Present	Boston College Jesuit Institute, Advisory Board
2003	Organized, moderated and spoke at BC GSSW’S Annual Mary Mason Breakfast for Field Supervisors
2003-Present	Boston College GSSW Promotion and Tenure
2003-06	Boston College GSSW Steering Committee for Strategic Planning;
2004-05	Boston College Chorale
2004-06	GSSW Institutional Sponsor for Othelia Lee, PhD for the Hartford Geriatric Social Work Faculty Scholar Program
2005	Boston College’s Strategic Plan for Institute on Aging
2005-Present	GSSW Older Adults and Family Cluster
2005-Present	GSSW GLBTQ Family Action Group
2007-Present	Boston College Intersections Program
2007-Present	GSSW Diversity Committee Member
2007-Present	GSSW Faculty Hiring Committee
2007-Present	GSSW PhD Committee
2007-Present	Boston College Catholic Intellectual Tradition
2008-Present	Boston College Spectrum Faculty Advisor
2009	GSSW Strategic Planning Task Force
2009	Promotion and Tenure (BC GSSW)

2009	Older Adults and Family Cluster (BC GSSW)
2009	Advisory Board of the Jesuit Institute (BC)
2009	Faculty Hiring Committee (BC GSSW)
2009	GLBTQ Family Action Group Chair (BC GSSW)
2009	BC Catholic Intellectual Tradition
2009	Strategic Planning Task Force (BC GSSW)
2009	Afternoon of Service (BC GSSW)
2010	Doctoral Committee
2010	LGBT Resiliency Conference Committee
2010-Present	Spectrum, Faculty Advisor
2010	Promotion & Tenure Committee Member
2010-Present	Strategic Planning Committee Member
2010-Present	Diversity Committee Member
2010	Search Committee Member
2011	Institute of Aging (IOA) Advisory Committee
2012	Member, GSSW Diversity Programming
2012	Member, Promotion & Tenure Committee
2012	Member, Social Innovation Council
2012	Member, GSSW International PhD Steering Committee

PUBLIC SERVICE

1971-72	Project Director and Board Member Link, Inc. (a settlement house in the north end of Hartford, Connecticut linking the talents and resources of the University of Connecticut Schools of Law and Social Work and the Blue Hills Civic Association)
1989-91	Chair, Cultural Committee Connecticut Chapter of the Latin America Parents Association
2001-Present	Mentor, John A Hartford Foundation's "Faculty Scholar Program"
2002-Present	Substitute Homilist, United Riverside Congregational Church, Lawrence, MA

2003-07	Advisory Board Member for the Boston Medical Center's Elderly Living at Home (homeless) program
2007-08	AMERIGROUP Advisory Committee
2008-10	Massachusetts's Governor's Long-Term Care Financing Advisory Committee
2009	Home Health Care (Editorial Board)
2011	AMERIGROUP Advisory Committee
2011	Center for Population Research in LGBT
2011	Massachusetts LGBT Aging Needs Assessment (MLANA) Coalition
2012	Center for Population Research in LGBT
2012	Massachusetts's LGBT Aging Needs Assessment (MLANA) Coalition
2012	Elizabeth Warren's 2013 Senate Campaign Volunteer

TEACHING

Teaching experience has revolved around health care policy, long-term care research and public administration. A major theme has been linking research and practice.

Formal scheduled classroom teaching came in the Spring Semester of 1991 - co-leading a course on Long-Term Care Policy for nine Ph.D. candidates at the Yale School of Medicine.

Supervision of MSW students in clinical field placements has been a frequent responsibility, along with directed research for doctoral students in the dissertation stage. From 1988 to 1992 regular guest lectures on long-term care issues were provided under the aegis of the Travelers' Center on Aging at the University of Connecticut Health Center.

While serving as a Visiting Associate Professor at UCSF, two guest lectures were sponsored through the UCSF Institute of Health and Aging (one on innovative partnerships for financing long-term care and the other on case management) and two and a half days of colloquia and staff/student consultations were held at the UCLA Schools of Social Work and Public Health. A presentation on Public/Private Partnerships in Long-Term Care contributed to the California Geriatric Education Center's Public Health-Social Work Faculty Development Program.

I have presented special colloquia or lectures at Brandeis University, the University of Wisconsin-Oshkosh, the Barney School of Insurance at the University of Hartford, the Business School and the College of Arts and Sciences at the University of Connecticut, the University of Bridgeport, the University of Massachusetts-Boston, the University of Missouri-St. Louis, the University of Southern California, the University of California, Davis, and the University of California, Berkeley.

At the University of Maryland my responsibilities were research related, but each year I guest lectured in courses on Health Policy and Aging.

Since coming to the Boston College Graduate School of Social Work, I have taught SW 802: "The Challenge of the Aging Society", SW 802: "Policy for an Aging Society: Issues and Options, SW 883 "Social Planning and the Community", SW 884: "Strategic Planning", and SW 954: "Social Work Intervention Research"; offered

independent studies on “Advanced Public Health Services Grant Writing” and “Adventure Therapy: Applicability for Persons with Disabilities”; and developed a Field Unit for MSW Students.

FORMAL SCHEDULED CLASSES (YALE UNIVERSITY, SCHOOL OF MEDICINE)

<u>Semester</u>	<u>Academic Year</u>	<u>Course Title</u>	<u>Contribution</u>	<u>Class Size</u>
S	1991	Long-Term Care Policy	Lectured and co-led discussions in collaboration with Professor Lisa Berkman	9 Ph.D. candidates

FORMAL SCHEDULED CLASSES (UNIVERSITY OF CONNECTICUT, SCHOOL OF MEDICINE)

<u>Semester</u>	<u>Academic Year</u>	<u>Course Title</u>	<u>Contribution</u>	<u>Class Size</u>
S/F	1988-1992	Health Care Policy	A lecture a semester on long-term care needs, service delivery and finance	20 medical school and dental school students
S	1992	Health Care Policy	A lecture a semester on long-term care finance	6-8 post-doctoral fellows

FORMAL SCHEDULED CLASSES (UNIVERSITY OF CALIFORNIA-LOS ANGELES)

<u>Year</u>	<u>Topic</u>	<u>Hours</u>
1993	"Public/Private Partnerships on Long-Term Care Insurance: The Connecticut and California Initiatives	2 Plus 2 brown bag lunch presentations
1993	"Public and Private Partnerships on Long-Term Care" as part of the California Geriatric Education Center Faculty Development Program - Summer Intensive	1

FORMAL SCHEDULED CLASSES (UNIVERSITY OF CALIFORNIA-SAN FRANCISCO)

<u>Year</u>	<u>Topic</u>	<u>Hours</u>
1993	"Financing Long-Term Care: Combining the Resources of the Public and Private Sectors" and "Care Management in Long-Term Care"	4

FORMAL SCHEDULED CLASSES (BOSTON COLLEGE, GSSW)

<u>Semester</u>	<u>Academic Year</u>	<u>Course Title</u>	<u>Course Name</u>	<u>Class Size</u>
Spring	2000-2001	SW 802	"The Challenge of	9 MSW/3 PhD

the Aging Society”

Summer	2001	SW 884	“Strategic Planning”	9 MSW
Spring	2002	SW 802	“Aging: Issues & Options”	7
Fall	2002	SW884	“Strategic Planning”	1
Spring	2003	SW802	“Aging: Issues & Options”	9
Fall	2003	SW 883	“Soc Planning/ Community”	27
Fall	2003	SW 884	“Strategic Planning”	6
Spring	2004	SW802	“Aging: Issues & Options”	8
Spring	2005	SW 802	“Policy for an Aging Society: Issues and Options”	3
Spring	2006	SW 954	“Social Work Intervention Research”	13
Spring	2007	SW 954	“Social Work Intervention Research”	6
Spring	2008	SW 954	“Social Work Intervention Research”	5
Spring	2009	SW954	“Social Work Intervention Research”	6
Spring	2010	SW954	“Social Work Intervention Research”	8
Spring	2011	SW954	“Social Work Intervention Research”	4
Spring	2011	SW802	“Policy for an Aging Society: Issues & Options”	21
Spring	2013	SW802	“Policy for an Aging Society: Issues & Options”	

GUEST LECTURES

<u>Year</u>	<u>Setting</u>	<u>Topic</u>	<u>Hours</u>
1980	University of Wisconsin-symposium Oshkosh	"Public Funding for Adult Day Care: a Case Study on the Political Change Process"	3 hr plus 2 hr graduate student seminar
1985	University of Bridgeport	"The Long-Term Care Service Delivery System"	3
1990	University of Massachusetts, Boston	"Testing the Limits of Private Insurance"	5
1991	University of Hartford	"Long Term Care Seminar" "Long Term Care Insurance Primer"	2 2
1991	Yale University	"Recent Developments in Long Term Care Financing"	3
1992	University of Missouri, St. Louis	"The Role of Research in Shaping and Evaluating Connecticut's Public/Private Partnership for Financing LTC"	2
1992	University of Southern California	"Research and Public Policy: The Case of the Connecticut Partnership for Long-Term Care"	2
1994	University of Southern California, Advanced Policy and Aging Seminars	"Long-Term Care Financing Alternatives"	3
1994	University of California, Davis	"Public/Private Partnerships for Long-Term Care"	2
1994	University of California, Berkeley	"The California Partnership for Long-Term Care"	2
1997 1998	University of Maryland	"Consumer Direction and the Cash and Counseling Demonstration"	2
1999	University of Connecticut	"Consumer Direction of Home and Community Based Services"	3
2000	Brandeis University	"Consumer Direction of Home and Community Based Services"	3
2000	Brandeis University	"The Cash and Counseling Demonstration and Evaluation"	3
2001	University of Mass-Boston	"Early Implementation Lessons from the Cash and Counseling"	2

		Demonstration and Evaluation”	
2001	University of South Carolina Medical School	“Consumer Direction of HCBS”	2
2002	University of Southern Maine	“Cash and Counseling: Next Steps”	2
2003	Boston College	“Psychology of Aging”	2
2003	Boston College	“Gerontological Nursing”	2
2005	Johns Hopkins, School Of Public Health	“Introduction to Advocacy: The Importance of the Three-Minute Elevator Ride”	

PREDOCTORAL STUDENTS SUPERVISED

Master of Social Work Field Placement Supervision

1974-75	Christie Sachs	(University of Connecticut)
1981	Ben Shires	(University of South Florida)
1983-84	Dianne Rhoades	(University of Connecticut)
1984-85	Dianne Rhoades (special research project)	(University of Connecticut)
1984	Rogene Tweeten	(University of Wisconsin)
1985-86	Renée Austin	(University of Connecticut)
1986-87	Judy Weber	(University of Connecticut)
1988-89	David Guttchen	(University of Connecticut)
1991-92	Anna Turner	(University of Connecticut)
2000	Kahoney Her	(Boston College GSSW)
2001-2002	Paul Crawford and Erin Barrett	(Boston College GSSW)
2002-2003	Mohini Mishra	(Boston College GSSW)
2003	Kathy Papineau	(Boston College GSSW)
2004	Elizabeth Maguire	(Boston College GSSW)
2005-2006	Rachel Shiffrin	(Boston College, GSSW)
2009	Abby Schwartz	(Boston College, GSSW)
2009	Haesang Jeon	(Boston College, GSSW)

2009	Lorena Lopera	
2010	Jackie Sherburn	(Boston College, GSSW)
2010	Haesang Jeon	(Boston College, GSSW)
2011	Nicole Foxe	(Boston College, GSSW)
2011	Fengxia Han	(Boston College, GSSW)
2012	Felicia Falchuk	(Boston College, GSSW)
2012	Delilah Magardo	(Boston College, GSSW)
2012	Ilan Rodriguez	(Boston College, GSSW)0

PhD in Social Work Internship

1982	William Winters	(Fordham University)
2007-2008	Jennifer Randall	(Boston College, GSSW)

MSW/PhD in Social Work Internship

2006-2008	Julie Norstrand	(Boston College, GSSW)
2007-2008	Venera Bekteshi	(Boston College, GSSW)
2008-2009	Abigail Schwartz	(Boston College, GSSW)

Doctoral Dissertation Committees

1983	Steven Wisensale	(Brandeis University)
1991	Sharon Sokoloff	(Brandeis University)
1993	William Faraclas	(Yale University)
2000	Jane Tilly	(University of Michigan)
2000	Marie Squillace	(University of Maryland)
2002-2004	Walter Kuliesis	(Brandeis University)
2003-2008	Deborah Sheehan	(Boston University-withdrew)
2003-2005	Ann Whitney Breihan	(University of Maryland, Baltimore County)
2005-2007	David Brennan	(Boston College)
2007-Present	Jessica Johnson	(Boston College)

2007-2008	Jeff Driskell	(Boston College)
2007-Present	Marissa Perez	(Boston College)
2008-Present	Maria Calvo Vilches	(Boston College)
2008-Present	Ethan Corona	(Rochester University-withdrew)
2008-2010	Jacqueline Dyer	(Boston College)
2009-Present	Karen Zgoda	(Boston College)
2009-2011	Erin McGaffigan	(UMass Boston)
2009-2011	Wade Taylor	(Boston College)
2009-2012	Merrily Evdokimoff	(Boston College GSON)
2009-Present	Patrica Yu	(Boston College)
2010-Present	Haesang Jeon	(Boston College)
2010- Present	Julie Norstrand	(Boston College)
2011-Present	Colleen Hayden	(Boston College)
2011-Present	Abby Schwartz	(Boston College)
2011-Present	Haesang Jeon	(Boston College)
2011-Present	Melissa Harry	(Boston College)
2011-Present	Bevin Croft	(Brandeis University)
2011-Present	Allison Rhodes	(Boston College)
2011-Present	Rene Caraphina	(Boston College)
2012-Present	Erin Singer	(Boston College)
2012-Present	Victoria Pineiro	(Boston College)
2012-Present	Jouyoung Kong	(Boston College)

CURRICULUM DEVELOPMENT

- 1985 Supervisor, Caregiver Education-Support Group Training Project. Included the development of a 24-hour course for health and social service professionals on how to develop caregiver educational support groups. Funded by the Connecticut Department on Aging, Social Service Block Grant, \$10,000.
- 1987-88 Co-Principal Investigator, Caregiver Information Project, a joint effort of the Connecticut Department on Aging and the Travelers Center on Aging at the University of Connecticut. Included a 16-hour training course, held in five state regions, along with promoting collaboration

among religious, educational, health and social service organizations. Funded by the Administration on Aging, Department of Health and Human Services (90AT0309/01), \$100,000.

- 1991-93 Consultant, Connecticut Aging Awareness Project, a joint effort of the Connecticut Department of Education, Department on Aging and Center for Understanding Aging. Involved the development of a teacher-training program and six related guides on aging education and intergenerational programs. Funded by the Administration on Aging, Department of Health and Human Services (90AT0494) and ITT Hartford Insurance Foundation. \$120,000.
- 2004-2005 Developed new course for the PhD program entitled, "Social Work Intervention Research"
- 2009 GLBTQ
- 2011 Developed "Social Work Intervention Research" for online teaching.

RESEARCH AND CREATIVE ACTIVITY

Between 1987 and 1995 a series of research projects were undertaken as part of the Robert Wood Johnson Foundation-funded demonstration to develop and evaluate a Public/Private Partnership to Finance Long-Term Care. As Principal Investigator, first in Connecticut (1987-92) and then in California (1992-1995), my personal program of research ranged from:

- a) research to define and clarify the problem areas (e.g. length of stay and spend-down);
- b) research to simulate the costs and effects of various funding models;
- c) research to aid in the design of specific program features;
- d) the design of a uniform reporting and tracking system; and
- e) evaluation and management research.

This public/private partnership approach has proven to be a viable mechanism for financing nursing home and community care. To date, some of the greatest contributions have been in increased knowledge about length of stay in nursing homes and community care, a better understanding of the "spend-down" phenomena, improved standards for private long-term care insurance, increased affordability of private insurance and the refinement of key service delivery features such as the "insured event" for triggering benefits and a system of care management.

In December of 1995, I became National Project Director for the Cash and Counseling Demonstration and Evaluation where my responsibilities included coordination and direction of this major social experiment, technical assistance to the participating states, leadership of the research team investigating the preference of Medicaid personal care recipients and oversight of the overall evaluation.

RESEARCH GRANTS AWARDED

Flexible Levels of Nursing Home Care

"Flexible Levels of Care", federal Health Care Financing Agency, Grant # 11-P-97483/1-01, 1979-80, Kevin J. Mahoney, Ph.D. - Principal Investigator, State of Connecticut, \$105,000.

Public/Private Partnership to Finance Long-Term Care

"Planning and Researching the Feasibility of a Public/Private Partnership to Finance Long-Term Care in Connecticut", the Robert Wood Johnson Foundation, Grant # 12555, 1987-89, Kevin J. Mahoney, Ph.D. - Principal Investigator, State of Connecticut, \$356,000.

"Implementing and Evaluating the Connecticut Partnership for Long-Term Care", the Robert Wood Johnson Foundation, Grant # 14594, Kevin J. Mahoney, Ph.D.- Principal Investigator, State of Connecticut, \$2,300,000.

"Implementing and Evaluating the California Partnership for Long-Term Care", the Robert Wood Johnson Foundation, Grant #19512, 1992-95, Kevin J. Mahoney, Ph.D. - Principal Investigator, State of California , \$2,100,000.

Cash and Counseling Demonstration and Evaluation

Technical Assistance and Direction (TAD) Grants

"Evaluation of Personal Assistance Services - Cash and Counseling", The Robert Wood Johnson Foundation, Grant # 028106, 1996, Kevin J. Mahoney, Ph.D. - National Project Director, University of Maryland Center on Aging (UMCA), \$232,440.

"Evaluation of Personal Assistance Services - Cash and Counseling", The Robert Wood Johnson Foundation, Grant # 028431, 1997, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$324,390.

"Evaluation of Personal Assistance Services - Cash and Counseling", The Robert Wood Johnson Foundation, Grant # 031519, 1998, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$542,562.

"Evaluation of Personal Assistance Services - Cash and Counseling", The Robert Wood Johnson Foundation, Grant # 033878, 1999, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$476,864.

"Evaluation of Personal Assistance Services - Cash and Counseling", The Robert Wood Johnson Foundation, Grant # 036498, 2000, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$608,076.

"Evaluation of Personal Assistance Services - Cash and Counseling", The Robert Wood Johnson Foundation, Grant # 041307, 2001, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$737,528.

"Evaluation of Personal Assistance Services—Cash & Counseling", The Robert Wood Johnson Foundation, Grant # 044394, January 1, 2002 – June 31, 2004, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$761,021.

State Planning and Implementation Awards (Overseen by the University of Maryland Center on Aging)

"Arkansas - IndependentChoices: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, Grant #030280, 1996-2000, \$448,294.

"Arkansas - IndependentChoices: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, Grant #038864, 2000-2001, \$146,936.

"Arkansas - IndependentChoices: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, Grant #041810, 2001, \$99,962.

"Florida – Consumer-Directed Care Project: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, Grant #030840, 1996-97, \$159,582.

"Florida – Consumer-Directed Care Project: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, Grant #031277, 1998-2001, \$340,418.

"Florida – Consumer-Directed Care Project: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, Grant #039548, 2000-2001, \$144,975.

"Florida – Consumer-Directed Care Project: Cash and Counseling Demonstration and Evaluation", The Robert Wood Johnson Foundation, \$100,000 authorized.

“New Jersey – Personal Preference: Cash and Counseling Demonstration and Evaluation”, The Robert Wood Johnson Foundation, Grant #030839, 1997-1999, \$167,626.

“New Jersey – Personal Preference: Cash and Counseling Demonstration and Evaluation”, The Robert Wood Johnson Foundation, Grant #031278, 1998-2001, \$332,371.

“New Jersey – Personal Preference: Cash and Counseling Demonstration and Evaluation”, The Robert Wood Johnson Foundation, Grant #040663, 2001, \$116,850.

“New Jersey – Personal Preference: Cash and Counseling Demonstration and Evaluation”, The Robert Wood Johnson Foundation, 2001, \$100,000.

“New York - Independent Choices: Enhancing Consumer-Direction for People with Disabilities”, The Robert Wood Johnson Foundation, Grant #030279, 1996-2000, \$498,738 (spent \$157,552).

Survey Research and Focus Group Awards

“Preference Study for Self-Direction - Arkansas/New York”, The Robert Wood Johnson Foundation, Grant #030555, 1996-98, Kevin J. Mahoney, Ph.D., Project Director and Co-Principal Investigator, (UMCA), \$180,000.

“Preference Study for Self-Direction - Florida/New Jersey”, The Robert Wood Johnson Foundation, Grant #030861, 1997-98, Kevin J. Mahoney, Ph.D., Project Director and Co-Principal Investigator, (UMCA), \$230,000.

Demonstration/Evaluation Awards

“Evaluation of Personal Assistance Services - Cash and Counseling”, The Robert Wood Johnson Foundation, Grant #028110, 1995-2002, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$1,587,211.

“Evaluation of Personal Assistance Services - Cash and Counseling”, The Robert Wood Johnson Foundation, Grant # 030862, 1998-2002, Kevin J. Mahoney, Ph.D. - National Project Director, (UMCA), \$1,100,000.

“Evaluation of Personal Assistance Services - Cash and Counseling”, The Robert Wood Johnson Foundation, Grant # 038750, 2000-2002, Kevin J. Mahoney, Ph.D.- National Project Director, (UMCA), \$436,394.

“Evaluation of Personal Assistance Services - Cash and Counseling”, The Robert Wood Johnson Foundation, Grant # 042387, 2001-2005, Kevin J. Mahoney, Ph.D.- National Project Director, (UMCA), \$399,727.

“Cash & Counseling Demonstration/Evaluation: Next Steps” ASPE, #HHS-100-95-0046, 1995-2002, Kevin J. Mahoney, Ph.D.- National Project Director, (UMCA), \$3,477,840.

Cash and Counseling: Next Steps

“Cash & Counseling Demonstration/Evaluation: Next Steps” ASPE, #HHS-100-02-0018, 2002-2003, Modification #3, 2004, Kevin J. Mahoney, Ph.D.- National Project Director, Boston College GSSW, \$2,020,775.

“Technical Assistance/Environmental Assessment to Expand Cash & Counseling”, The Robert Wood Johnson Foundation, Grant# 045298, September 15, 2002 – August 31, 2005, Kevin J. Mahoney, Ph.D. - National Project Director, Boston College GSSW, \$218,479.

“Technical Assistance and Direction Grant – Cash & Counseling”, The Robert Wood Johnson Foundation, Grant # 049696, October 1, 2004, Kevin J. Mahoney, Ph.D. – National Project Director, Boston College GSSW, \$906,646.

“Technical Assistance and Direction Grant—Cash & Counseling”, The Robert Wood Johnson Foundation, Grant # 047500, January 1, 2003 – June 30, 2004, Kevin J. Mahoney, Ph.D. - National Project Director, Boston College GSSW, \$569,132.

“Technical Assistance and Direction Grant—Cash & Counseling”, The Robert Wood Johnson Foundation, Grant # 048513, September 1, 2003- September 30, 2004, Kevin J. Mahoney, Ph.D. - National Project Director, Boston College GSSW, \$961,271, (first TAD awarded under new \$7 million authorization).

“Technical Assistance and Direction Grant—Cash & Counseling”, The Robert Wood Johnson Foundation, Awarded October 1, 2005, Kevin J. Mahoney, Ph.D.- National Program Director, Boston College, GSSW, \$925,620.

“Technical Assistance and Direction Grant—Cash & Counseling”, The Robert Wood Johnson Foundation, Awarded October 1, 2006, Kevin J. Mahoney, Ph.D.- National Program Director, Boston College, GSSW, \$1,236,476.

“Cash & Counseling Demonstration/Evaluation: Next Steps” ASPE, Awarded September 25, 2006, Kevin J. Mahoney, Ph.D. - National Project Director, Boston College GSSW, \$799,923.

“Technical Assistance and Direction Grant—Cash & Counseling”, The Robert Wood Johnson Foundation, Awarded October 1, 2007, Kevin J. Mahoney, Ph.D.- National Program Director, Boston College, GSSW, \$815,791.

“Cash & Counseling Demonstration/Evaluation: Next Steps” ASPE, Awarded September 30, 2007, Kevin J. Mahoney, Ph.D. - National Project Director, Boston College GSSW, \$300,000.

Home and Community-Based Services Resource Network:

“Resource Network on Home and Community-Based Services”, The Medstat Group/ Health Care Financing Administration, 1999–2001, Kevin J. Mahoney, Ph.D.- Principal Investigator, Boston College GSSW, \$309,835.

“Provide Tracking of Home and Community-Based Care Expansion Activities and Targeted Technical Assistance”, The Medstat Group/ U.S. Department of Health and Human Services, 2000-2002, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$200,000.

“Home and Community-Based Resource Network Services: Expansion to Support Systems Change- Task 21”, The Medstat Group/ Health Care Financing Administration, 2001, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$74,767.

“Resource Network on Home and Community-Based Services- Tasks 5 and Task 10”, The Medstat Group/ Health Care Financing Administration, 2001, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$53,000.

“Home and Community-Based Services Resource Network Activities to Assist in the Development of Enduring Systems that Enable People with a Disability or Long-Term Illness to be Sustained in the Community”, The Medstat Group/ Health Care Financing Administration, 2001-2002, Kevin J. Mahoney, Ph.D.- Principal Investigator, Boston College GSSW, \$108,262.

“Home and Community-Based Services Resource Network”, The Medstat Group, 2002-2003, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$163,040.

“Home and Community-Based Services Resource Network Website”, The Medstat Group, 2003-2004, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$78,999.

Community Living Exchange Collaborative

“ILRU and The Technical Assistance Exchange”, Independent Living Research Utilization (ILRU), 2002, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$14,070.

“ILRU and The Technical Assistance Exchange”, Independent Living Research Utilization (ILRU), 2002-2003, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$154,496.

“Community Living Technical Assistance Exchange Collaborative”, Rutgers University, 2002-2003, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$94,519.

“Community Living Technical Assistance Exchange Collaborative”, Independent Living Research Utilization (ILRU), 2003-2004, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$248,325.

“Community Living Technical Assistance Exchange Collaborative Clearinghouse/Advisory Panel”, Rutgers University, 2003-2004, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$90,847.

“Community Living Technical Assistance Exchange Collaborative Clearinghouse/Advisory Panel”, Independent Living Research Utilization (ILRU), 2004-2005, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$253,005.

“Community Living Technical Assistance Exchange Collaborative Clearinghouse/Advisory Panel”, Rutgers University, 2004-2005, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$42,039.

“Community Living Technical Assistance Exchange Collaborative Clearinghouse/Advisory Panel”, Rutgers University, 2004-2005, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$64,593.

“Community Living Technical Assistance Exchange Collaborative”, Rutgers University, 2004-2005, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$69,593.

“Technical Assistance Exchange Collaborative-Independence Plus”, Rutgers University, 2004, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$93,390.

“Community Living Technical Assistance Exchange Collaborative”, Rutgers University, 2005-2006 (2001 CMS Award), Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$69,593.

“Community Living Technical Assistance Exchange Collaborative”, Rutgers University, 2005 (2003 CMS Award), Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$42,039.

“Community Living Technical Assistance Exchange Collaborative”, Independent Living Research Utilization (ILRU), 2006 (2004 CMS Award), Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$253,005.

“Community Living Technical Assistance Exchange Collaborative”, Rutgers University, 2005-2006 (2001 CMS Award), Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$69,593.

“CMS Clearinghouse Grant”, Award Period: September 30 2006 – September 30 2008, Kevin J. Mahoney, Boston College GSSW, \$208,263.

“Community Living Technical Assistance Exchange Collaborative”, Independent Living Research Utilization (ILRU), Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$186,865 (amount awarded for Federal FY07 October 2006 – September 2007)

“Community Living Technical Assistance Exchange Collaborative”, Independent Living Research Utilization (ILRU), Duration October 1, 2003-March 31st, 2007(2002 CMS Award No Cost Extension) Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, Total award amount:\$501,330

HCBS Clearinghouse grant, Robert Wood Johnson Foundation, Duration September 1, 2008-August 31, 2009, Kevin J. Mahoney, Boston College, GSSW, \$99,982.

ILRU Clearinghouse for the Community Living Exchange Collaborative (2002 CMS Award No Cost Extension) Total award amount: \$501,330; Duration: 10/1/03 – 2/2009.

HCBS.org Sponsorship Funding, November 2009–May 2010, Total award \$65,000.

Long-Term Care Awareness Project:

“Design and Test Evidence-Based Communications Strategies to Increase Consumer Awareness and Understanding of Long-Term Care Options”, The Medstat Group 2000-2003, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$174,243.

John A. Hartford Foundation’s GeroRich Project

“Geriatric Enrichment in Social Work Education”, 2002-2004, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$60,000.

Care Manager Re-Training Project

“Care Manager Re-Train Project”, The Medstat Group 2003-2005, Kevin J. Mahoney, Ph.D.-Principal Investigator, Boston College GSSW, \$217,000.

SAMSHA Project

“Does Mental Illness affect Consumer-Directed Care?: Learning from the Cash & Counseling Demonstration and Evaluation”, Substance Abuse and Mental Health Services Administration, (Ce Shen as Principal Investigator), Submitted December 2005, \$985,634.

LIFE Accounts

LIFE Accounts, Independent Living Research Utilization (ILRU), Kevin J. Mahoney, Boston College GSSW, \$4,339 (amount awarded for Federal FY07 October 2006 – September 2007).

National Resource Center for Participant-Directed Services

The Robert Wood Johnson Foundation, “Business Plan Grant,” \$99,840. (November 1, 2007-October 31, 2008).

Atlantic Philanthropies, “Business Plan Grant,” \$215,000. (January 1, 2008-December 31, 2008).

Atlantic Philanthropies, “National Center for Consumer Direction,” \$3,500,000. (January 1, 2009 – Present).

The Robert Wood Johnson Foundation, “The Self-Direction Cash & Counseling Research: Technical Assistance Center ,” \$4,751,055. (September 1, 2008 – Present).

Administration on Aging "Technical Support for Consumer Directed Programs," \$998,888.00. (September 30, 2008 - June 30, 2012).

ASPE Amendment, Ends September 30, 2009, Kevin J. Mahoney, Boston College, GSSW, \$39,978.38.

ASPE Amendment, Ends September 30, 2010, Kevin J. Mahoney, Boston College, GSSW, \$59,998.

The SCAN Foundation, "Papers to Inform CLASS Component of the Patient Protection and Affordable Care Act", \$20,968, (September 21, 2010 – March 2011)

Thomson Reuters (Health Care) Inc., "MFP Technical Assistance", \$34,374, (January 1, 2009 – July 30, 2010).

The Administration on Aging, "Accelerating Adoption of Participant Direction Philosophy and Models in the Aging Network," \$784,698. (August 1, 2011 - Present).

Thomson Reuters Health Care, "Work Pursuant to Commonwealth of Virginia Systems Transformation Grant," \$58,121.00. (January 1, 2009 - September 30, 2011).

Thomson Reuters Health Care, "Technical Assistance: Thomson Reuters (Healthcare) Inc./Quality Enterprise," \$40,266.00. (January 1, 2009 - Present).

Acumen, "Technical Assistance to Medicaid HCBS Programs," \$33,581.00. (January 1, 2009 - September 20, 2011).

ARCH, "Respite Care Guidebook," \$8,000.00. (June 1, 2011 - August 31, 2011).

The Administration on Aging, "Cash & Counseling: Sustainable Paradigm for Service Delivery - Year 3 of 3," \$399,444.00. (July 1, 2010 – June 30, 2012).

The SCAN Foundation, "Papers to Inform CLASS Component of the Patient Protection and Affordable Care Act," \$69,221.00. (August 1, 2010 - March 15, 2011).

Veterans Health Administration, "Veteran Directed Home & Community Based Services Program (Yr 1 of 4)," \$299,771.00. (September 30, 2010 – December 31, 2011).

Boston University (Administration for Community Living), "Building the Business Capacity of Aging and Disability Community-Based Networks for Managed Long-Term Services and Supports," \$24,665.00. (September 1, 2012 – Present).

The Gerontological Society, "What Pathways Link Social Capital to Physical and Mental Health Among Older Adults " \$25,000.00. (November 26, 2012 - Present).

Veterans Health Administration, "Veteran Directed Home & Community Based Services Program, Year 2 of 4 " \$509,754.00. (July 1, 2011 - Present).

Truven Health Analytics (ASPE), "Study of Medicaid Managed Long-Term Services & Supports" \$75,000.00. (September 30, 2012 - Present).

New Editions Consulting, Inc., "Home and Community Based Services (HCBS): Technical Assistance for Self-directed and HCBS" \$24,000.00. (September 22, 2011 - Present).

US Department of Veteran Affairs, Federal, "Veteran Directed Home and Community Based Services Programs, Year 3 of 4" \$512,977.00. (July 1, 2012 - Present).

The Robert Wood Johnson Foundation, "An Environmental Scan of Self-Direction in Adult Behavioral Health Services & Supports" \$299,999.00. (September 1, 2011 - February 28, 2013).

NASUAD "HCBS.org License Transfer," \$20,900.00. (June 1, 2012 - January 31, 2013).

Burness Communications (RWJF), "Communications Strategy," \$26,312. (January 1, 2013 – Present).

PCG Public Partnerships, LLC, "A Qualitative Participant Direction Study," \$16,551. (January 15, 2013 – Present).

Mathematica (CMS), "Participant Directed Training & TA for Integrated Care Service Delivery," \$110,765. (January 16, 2013 – Present).

The Robert Wood Johnson Foundation, "Development of a Plan for a Large-Scale Demonstration of Self-Direction in Behavioral Health Services & Supports," \$139,266. (May 15, 2013 – Present).

AARP, "National Inventory," \$37,599. (June 1, 2013 – Present).

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NATIONAL ADVISORY COMMITTEE RECOMMENDATIONS

- 1993-1994 National Advisory Committee on Long-Term Care Case Management. Assembled to inform the development of Guidelines for Case Management Practice Across the Long-Term Care Continuum as part of a Robert Wood Johnson Foundation Grant to Connecticut Community Care, Inc.

PROCEEDINGS

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- 1994 Testimony on "Long-Term Care and Health Care Reform" before the State of California Senate Sub-Committee on Aging. May 17, 1994.
- 1995 Testimony on "Tax Treatment and Appropriate Standards for Private Long-Term Care Insurance Policies" before the Health Subcommittee of the U.S. House of Representatives' Committee on Ways and Means. January 20, 1995.
- 2003 NCOA/NASUA Advisory Panel. Testimony before Senate Select Committee on Aging. May 15-16.
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- 2003 Testimony before Health Subcommittee of U.S. House Energy and Commerce Committee. Serial No.108-128. Pages11-20. Hearing on “Consumer Directed Services: Improving Medicaid Beneficiaries’ Access to Quality Care.” June 5th 2003.
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