

**The Faculty of Medicine of Harvard University  
Curriculum Vitae**

**Date Prepared:** June 25, 2024  
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**Education:**

2002–2006	B.A. with Honors	Public Health, Economics	Johns Hopkins University
2006–2014	M.D., Magna Cum Laude	Medicine	Harvard Medical School
2008–2012	Ph.D.	Health Policy (Economics)	Harvard University

**Postdoctoral Training:**

2014–2015	Internship	Internal Medicine, Primary Care	Massachusetts General Hospital
2015–2017	Residency	Internal Medicine, Primary Care	Massachusetts General Hospital

**Clinical and Research Fellowships:**

2010–2013	Fellow, Aging and Health Economics	National Bureau of Economic Research
2014–2017	Clinical Fellow, Medicine	Harvard Medical School

**Faculty Academic Appointments:**

2017–2021	Assistant Professor	Health Care Policy	Harvard Medical School
2018–2022	Assistant Professor	Medicine	Harvard Medical School, MGH
2021–	Associate Professor	Health Care Policy	Harvard Medical School
2022–	Associate Professor	Medicine	Harvard Medical School, MGH

**Appointments at Hospitals/Affiliated Institutions:**

2017–2020	Assistant in Medicine	Medicine (DGIM)	Massachusetts General Hospital
2020–	Assistant Physician	Medicine (DGIM)	Massachusetts General Hospital

**Other Professional Positions:**

2004–2006	Intern (2004-05), Special Guest (2005-06) Center on Social and Economic Dynamics	The Brookings Institution, DC
2005–2006	Clinical Research Fellow, Department of Medicine	Union Memorial Hospital, MD
2015	Analyst/Advisor, Office of the Assistant Secretary for Planning and Evaluation (Jul-Aug)	U.S. Department of Health and Human Services
2015–2016	Visiting Fellow, Health Policy Commission	Massachusetts
2016	Visiting Scholar, The Dartmouth Institute (Aug-Sep)	Dartmouth College
2016	Visiting Scholar, Leonard Davis Institute and Dept. of Medical Ethics and Health Policy (Oct-Nov)	University of Pennsylvania
2017–2022	Faculty Affiliate, Center for Primary Care	Harvard Medical School

**Administrative Leadership Positions:**

**Local**

2003–2005	Founder and Editor-in-Chief, Epidemic Proportions: Johns Hopkins Undergrad Public Health Journal	Johns Hopkins University
2005–2006	President, Johns Hopkins Pre-Medical Honor Society	Johns Hopkins University
2008–2012	Resident Tutor, Pre-Medicine Committee	Cabot House, Harvard College
2010–2011	Co-President, Harvard University Student Chapter	AcademyHealth
2013–2014	Co-Chair, Student Leadership Committee	HMS Center for Primary Care
2018–2021	Co-Director, Partners/MGB Health Policy Course	Mass General Brigham

2018-19, 2023	Co-Director, Evidence, Insight and Strategy for Optimizing Health Benefits Course	Harvard Medical School Office for External Education
2021–	Co-Director, Essentials of the Profession (EOP) 1— Health Policy course for first year students	Harvard Medical School and School of Dental Medicine
2021–	Director, Health Policy Track, Internal Medicine Residency Program	Massachusetts General Hospital Department of Medicine
2022–2023	Director, Health Policy curriculum, Global Health Care Leaders Program	Harvard Medical School Office for External Education
2022–	Faculty Director of Research	HMS Center for Primary Care
<b>National</b>		
2020–2022	Co-chair (2020-21), Chair (2021-22), Scientific Abstract Committee, SGIM Annual Meetings	Society of General Internal Medicine (SGIM)
2023–2024	Chair, SGIM 2024 Program Committee	SGIM 2024 Annual Meeting

**Committee Service:**

**Local**

2011–2014	Student Steering Committee, MD-PhD Program	Harvard Medical School
2014–2015	Community Advisory Board, Center for Primary Care	Harvard Medical School
2015–2016	Leadership Council, The Family Van	Harvard Medical School
2015–2017	Representative of the Department of Medicine, Trainee Quality and Safety Committee (2-yr term)	Massachusetts General Hospital
2016–2017	Resident Co-Leader, Resident Leadership Curriculum and Quality and Safety Committee	Massachusetts General Hospital Department of Medicine
2017–	Committee on Higher Degrees in Health Policy	Harvard University
2018–2019	Finance Committee, Internal Medicine Associates	Massachusetts General Hospital
2018–	Standing Committee on Health Policy (Harvard)	Ph.D. Program in Health Policy
2021	Diversity, Equity, and Inclusion Scholarship and Research Committee	Harvard Medical School

**Regional**

2009–2012	Committee on Publications	Massachusetts Medical Society
2010–2012	Task Force on Health Care Reform	Massachusetts Medical Society
2010–2015	Boston Advisory Board	Albert Schweitzer Fellowship

**National**

2015	Technical Expert Panel: “Improving Medicare Advantage Benchmarks”	U.S. Department of Health and Human Services
2016	Payment Transformation Blue Ribbon Panel	Hawaii Medical Service Assoc.
2020	Technical Expert Panel	Health Care Cost Institute
2021	Technical Expert Panel	American Board of Family Medicine
2021–2022	Transforming Health Care to Create Whole Health	National Academies of Sciences, Engineering, and Medicine
2023	State Efforts to Control Healthcare Costs	Aspen Institute Working Group
2023–	Stakeholder Advisory Group, National Center for Excellence in Primary Care Research	Agency for Healthcare Research and Quality
2023–	Commission on Investment Imperatives for a Healthy Nation	National Academy of Medicine

**Professional Societies:**

2008–	Massachusetts Medical Society
2009–	American Society of Health Economists
2011–	AcademyHealth
2014–2015	American College of Physicians
2014–	Society of General Internal Medicine
2018–	American Economic Association

**Grant Review Activities:**

2016	Standing Committee on Behavioral and Social Science of Aging (Ad hoc Grant Reviewer)	National Institute on Aging
2018	Scientific review panel (Ad hoc Grant Reviewer)	National Institute on Aging
2022-2024	Healthcare Safety and Quality Improvement Research (HSQR) study section	Agency for Healthcare Research and Quality

**Other Review Activities:**

2014	Abstract Reviewer, Annual Research Meeting	AcademyHealth
2015–2016	Student Poster Abstract Committee	AcademyHealth
2019	Abstract Reviewer, 25th Annual National Research Service Award Trainees Research Conference	Agency for Healthcare Research and Quality (AHRQ)
2021	Medicare Payment Advisory Commission Report	MedPAC
2024	Improving the Health and Wellbeing of Children and Youth through Health Care System Transformation	National Academies of Sciences, Engineering, and Medicine

**Editorial Activities:****Ad hoc Reviewer**

Academic Medicine  
 American Economic Review  
 American Journal of Epidemiology  
 American Journal of Managed Care  
 Annals of Internal Medicine  
 British Medical Journal  
 Circulation  
 Circulation: Cardiovascular Quality and Outcomes  
 Forum for Health Economics & Policy  
 Health Affairs  
 Health Economics  
 Health Services and Outcomes Research Methodology  
 Health Services Research  
 Healthcare  
 Inquiry  
 International Journal of Health Care Finance and Economics  
 International Journal of Health Economics and Management  
 JAMA Internal Medicine  
 JAMA Health Forum  
 Journal of Clinical Oncology  
 Journal of General Internal Medicine  
 Journal of Health Economics  
 Journal of Health Politics, Policy, and Law  
 Journal of Human Resources  
 Journal of Public Economics  
 Journal of the American Medical Association  
 Journal of the European Economic Association  
 Lancet Public Health  
 Management Science  
 Medical Care  
 Medical Care Research and Review  
 Milbank Quarterly  
 New England Journal of Medicine  
 PLOS Medicine  
 Psychiatric Services

**Other Editorial Roles**

2013–2018	Associate Editor, Editor for Payment Reform (2013-17)	Healthcare
2017–2018	Guest Editor, Special Collection on Medicare Advantage	Inquiry
2017–2022	Editorial Board	PLOS Medicine
2022–	Editorial Board	Health Services Research
2022–	Associate Editor	JAMA Health Forum

### Honors and Awards:

2002–2006	Woodrow Wilson Research Fellowship, Johns Hopkins University
2005	Finalist, Rhodes Scholarship, District XV, United States
2005–2006	Suzy Bacon Fellowship (Honorary), Johns Hopkins University
2006	Outstanding Achievement in Public Health, Johns Hopkins University
2007	Edward Hickling Bradford Research Fellowship, Harvard Medical School
2007	PASTEUR Research Fellowship, Harvard Medical School
2009–2011	Certificate of Distinction in Teaching, Harvard University
	2009: Advanced Topics in Health Policy (GOV 1597)
	2010: Advanced Topics in Health Policy (GOV 1597)
	2011: Advanced Topics in Global Health and Health Policy (GHHP 99)
2010	Top 10 Papers Published in 2010, Health Affairs
2010–2011	Excellence in Tutorial Facilitation Award, Harvard Medical School
	2010: Introduction to Health Care Policy (HC.750)
	2011: Introduction to Health Care Policy (HC.750)
2011	Best Abstract, Most Outstanding Abstract, “Health Reform Implementation” category, AcademyHealth Annual Research Meeting, Seattle
2011	First place, Health Policy/Medical Education, Sixth Annual Research Poster Symposium, Massachusetts Medical Society
2011	Honorable Mention Award, Innovations Conference, HMS Center for Primary Care
2012	Best Abstract, Most Outstanding Abstract, “Delivery System Innovations” category, AcademyHealth Annual Research Meeting, Orlando
2012	Finalist, 18th Annual Health Care Research Award, NIHCM Foundation
2012	Joan P. Curhan Citizenship Award, Harvard University
2013	Article-of-the-Year Award, AcademyHealth
2014	Honors in a Special Field (Magna), Harvard Medical School
2014	Rose Seegal Prize (“Best research paper on the relation of the medical profession to the community”), Harvard Medical School
2014	Best Abstract Award (Residents), Department of Medicine, Mass General Hospital
2014	Daniel Ford Award (“Achievement in health services and outcomes research”), General Internal Medicine Housestaff Research Awards, Johns Hopkins Medicine
2014	First Place, Resident Research Category, MA Chapter, American College of Physicians
2015	National Winner, “High Value Care” category, Resident/Fellow Research Poster, Internal Medicine 2015, American College of Physicians
2015	Morton N. Swartz, M.D. Humanism in Medicine Award (selected by peers for “Joy in the practice of medicine and kindness to others”), Department of Medicine, MGH
2015	Hospital-Wide Individual Research Award, Massachusetts General Hospital
2016	Mack Lipkin Sr. Associate Member Scientific Presentation Award, SGIM
2016	Seema S. Sonnad Emerging Leader in Managed Care Research Award, AJMC
2017	Award for Excellence in Clinician Investigation, New England Region, SGIM
2018	Most-Shared Health Affairs Articles of 2017, Health Affairs
2018	HCUP Outstanding Article of the Year – Honorable Mention, AHRQ and AcademyHealth
2018	Ten Influential Studies in Health Services Research, National Academy of Medicine
2019	Milton W. Hamolsky Jr. Faculty Scientific Presentation Award, SGIM
2019	Bernie J. O'Brien New Investigator Award, International Society for Pharmacoeconomics and Outcomes Research
2019	Best Abstract, “Payment and Delivery System Innovations” category, AcademyHealth
2020	Outstanding Reviewer in 2019, Health Services Research

2020 Outstanding Junior Investigator of the Year, SGIM  
 2020 NIHCM Foundation Health Care Research Award  
 2020 Best Abstracts: “Addressing Consumer and Patients’ Preferences and Needs” category and “Payment and Delivery Systems Innovations” category, AcademyHealth  
 2022 Young Mentor Award, Harvard Medical School  
 2023 Best Abstracts and Best of ARM: “Medicare” category and “Child and Family Health” category, AcademyHealth Annual Research Meeting, Seattle  
 2024 Martin Prize in Population Health Sciences Research (with Chana Sacks), MGH  
 2024 Elected member, National Academy of Social Insurance

## **Report of Funded and Unfunded Projects**

### **Past**

2011–2014 “Provider Payment Reform and Implications for Health Care Costs”  
 National Institute on Aging (F30 AG039175)  
 Principal Investigator

2014–2016 Impact of Payment Reform on Physician Referrals, Patient Flows and Health Care Costs  
 National Institute for Health Care Management Foundation  
 Co-investigator (PI: Bruce Landon)

2014–2017 “The Impact of Employee Wellness Programs: A Randomized Controlled Trial”  
 Jameel Poverty Action Lab – North America  
 Co-investigator (PI: Katherine Baicker)

2015–2018 “The Impact of Employee Wellness Programs: A Randomized Controlled Trial”  
 Robert Wood Johnson Foundation (72611)  
 Co-Project Director (with Katherine Baicker)

2017–2020 HealthCare Markets and Regulation Lab at HMS, Laura and John Arnold Foundation  
 Co-investigator (PI: Michael Chernew)

2016–2021 “The Impact of Employee Wellness Programs”  
 National Institute on Aging (R01 AG050329)  
 Principal Investigator 2018–2021 (Katherine Baicker 2016–2018)

2021–2023 “Private Equity Acquisitions of Physician Medical Practices and Implications for Practice Patterns and Costs of Care,” National Institute for Health Care Mgmt Foundation  
 Co-investigator (PI: Jane Zhu)

2020–2023 “Measuring the Clinical and Economic Outcomes Associated with Delivery Systems”  
 Agency for Healthcare Research and Quality via NBER (U19HS024072, supplement)  
 Co-investigator (PI: Mary Beth Landrum)

2017–2023 “Inequities in Health Outcomes in the Twenty-First Century: Understanding New Causes and the Impact of Delivery System Reforms on Health Care Disparities”  
 National Institutes of Health, Office of the Director (DP5 OD024564)  
 Principal Investigator (NIH Director’s Early Independence Award)

2020–2023 HealthCare Markets and Regulation Lab at HMS, Arnold Ventures (20-04402)  
 Principal Investigator of Subproject on the value of care (PI: Michael Chernew)

2023 “The Economic and Clinical Impact of Childhood Firearm Injuries on Survivors & Family Members,” National Institute for Health Care Management Foundation  
 Principal Investigator

### **Current**

2020– “Improving Medicare in an Era of Change,” National Institute on Aging (P01 AG032952)  
 Co-Investigator (PI: Bruce Landon)

2023– “Evaluating Innovative Delivery System Models for Vulnerable Populations: Economic and Clinical Impact of the Commonwealth Care Alliance Model,” Arnold Ventures  
 Principal Investigator

2023– “Fast and Robust Weighting Methods for Targeted Comparative Effectiveness Research”  
 Patient-Centered Outcomes Research Institute (25648)  
 Co-Investigator (PI: Jose Zubizarreta)

- 2023– “Impact of Private Equity Acquisitions of Hospitals & Physicians on the Care of Medicare Beneficiaries with AD/DRD,” National Institute on Aging (3P01 AG032952-14S1)  
Principal Investigator
- 2023– “Private Equity Acquisitions in Primary Care: Effects on the Medicare Program,” Agency for Healthcare Research and Quality (R01 HS029467)  
Co-Principal Investigator
- 2024– “Private Equity’s Effects on Primary Care Practices Participating in Medicare Advantage” National Institute for Health Care Management Foundation  
Co-Principal Investigator
- 2024– “Understanding the Corporatization of U.S. Primary Care and Its Impact on Health Care Access, Quality, and Utilization,” Commonwealth Fund (24-23902)  
Co-Principal Investigator
- 2024– “Evaluations of Increasing State Investments in Primary Care: Effects on Spending, Utilization, and Quality,” Agency for Healthcare Research and Quality (R01 HS029497)  
Principal Investigator
- 2024– “State Investments in Primary Care: Heterogeneity by State Strategy Spending, Utilization, and Quality,” Arnold Ventures (24-10786)  
Principal Investigator

### **Training Grants and Mentored Trainee Grants**

- 2008–2009 Harvard University Ph.D. Program in Health Policy Training Grant  
Agency for Healthcare Research and Quality (T32 HS000055)  
Trainee (PI: Joseph Newhouse)
- 2009–2010 Harvard Medical School/Harvard University Walker Grant  
Harvard University PhD Program in Health Policy  
Trainee (PI: Joseph Newhouse)
- 2010–2011 Pre-doctoral Fellowship in Aging and Health Economics  
National Institute on Aging via NBER (T32 AG000186)  
Pre-doctoral Fellow (PI: David Wise)

### **Report of Local Teaching and Training**

#### **Teaching of Students in Courses:**

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|-------------|--|---|
| 2009–2010   | Advanced Topics in Health Policy<br>Co-Instructor, undergraduates  | Harvard College<br>1-2 2-hour classes/week, 13 weeks  |
| 2011 Spring | Advanced Topics in Global Health and Health Policy, Co-Instructor, undergraduates  | Harvard College<br>1 2-hour class/week, 13 weeks  |
| 2009–2015   | Introduction to Health Care Policy, medical and dental medicine students<br>2009–2011: Head Teaching Fellow<br>2009–2010, 2014: Tutorial leader<br>2011–2015: Guest lecturer | Harvard Medical School and Harvard School of Dental Medicine<br>3 1-hour classes/week, 4 weeks<br>1 2-hour lecture/year |
| 2015 Aug    | Economics for Health Policy, Guest lecturer, Master’s degree students  | Harvard T.H. Chan School of Public Health, 2-hour lecture   |
| 2016 Nov    | Health Care Management & Strategy, Guest lecturer, undergraduate students  | Wharton School, Univ of Pennsylvania<br>1.5-hour lecture  |
| 2016 Fall   | Health Care Systems, Guest lecturer, undergraduate students  | Wharton School, Univ of Pennsylvania<br>2 1.5-hour lectures   |
| 2017–       | Research in Health Economics, Guest lecturer, doctoral students  | Harvard Kennedy School<br>1.5-hour lecture per year   |
| 2018 Aug    | Economics for Health Policy, Guest lecturer, Master’s degree students  | Harvard T.H. Chan School of Public Health, 2-hour lecture   |
| 2018–2019   | Evidence, Insight and Strategy for Optimizing Health Benefits, U.S. employers  | Harvard Medical School Office for External Education, 3 days per year   |

2018–2022	MIT HMS Healthcare Innovation Bootcamp (students from 30+ countries), Guest lecturer	MIT and Harvard Medical School, 1-2 hour lecture per year
2018–	Core Course in Health Policy, Guest lecturer and Quality section leader (2020), PhD students	Harvard University 1 to 2 2-hour lectures per year
2019–	Essentials of the Profession 1—Health Policy, Co-director (2021-) and small group leader, medical and dental medicine students	Harvard Medical School and Harvard School of Dental Medicine 5 hours per week, 4 weeks per year
2019 Nov	U.S. Healthcare Industry and Regulatory Policy, Guest lecturer, graduate students	Harvard Kennedy School 1-hour lecture
2020–2023	Health Care Quality in America, Guest lecturer, Undergraduate students	Harvard College 1-hour lecture per year
2020–2022	Essentials of the Profession 2—Health Policy, Guest lecturer, medical and dental students	Harvard Medical School 1 2-hour lectures per year
2020–2022	Economics of Health Care—Public vs. Market Solutions, Guest lecturer	Harvard T.H. Chan School of Public Health, 1-hour lecture per year
2020–2023	HealthTech Fellowship Bootcamp, Guest lecturer	Harvard Medical School, 1-2 hour lecture per year
2020 July	MD-PhD Summer Course for entering students, Guest lecturer	Harvard Medical School 2 1-hour classes
2020 Nov	Confronting COVID-19: Future of Healthcare Policy and Healthcare Delivery, Guest lecturer	Harvard College 1-hour panel discussion
2022–2023	Global Health Care Leaders Program, Director of health policy curriculum	Harvard Medical School Office for External Education, 9 hours
2024	Hospitals & the Changing Landscape of Health Care Provision in America, Guest lecturer	Harvard T.H. Chan School of Public Health, 1-hour lecture
2024	US Healthcare Quality & Equity, Guest lecturer	Harvard T.H. Chan School of Public Health, 1.5-hour lecture
2024	Global Health Care Leaders Program, Guest lecturer	Harvard Medical School Office for External Education, 1.5-hour lecture

### **Formal Teaching of Residents, Clinical Fellows and Research Fellows (post-docs):**

2015–	Department of Medicine Noon Conference on health policy, residents (PGY 1-3) and faculty	Massachusetts General Hospital 1-2 1-hour lectures per year
2015–2016	Department of Medicine Ambulatory Care Curriculum, residents (PGY 2-3)	Massachusetts General Hospital 4 1-hour lecturers
2017–2021	Mass General Brigham Centers of Expertise Health Policy Course, residents and fellows across specialties (PGY 1-9)	Mass General Brigham, Boston, MA 1 week per year, 3-5 hours of lecture and discussion per year
2017 Mar	“Current Issues in Health Policy,” Department of Psychiatry, residents (PGY 3-4)	McLean Hospital 1-hour lecture
2017–	Department of Psychiatry Community Psychiatry Curriculum, residents (PGY 1-4)	Massachusetts General Hospital 2-3 hours of lectures per year
2017–2022	Department of Medicine Global Medicine Curriculum, interns (PGY 1)	Massachusetts General Hospital 1-2 1-hour lectures per year
2018–2022	Department of Psychiatry Child Psychiatry Fellowship Journal Club	Massachusetts General Hospital 1-hour seminar per year
2019–2020	Department of Medicine Management Leadership curriculum, residents (PGY 1-3)	Brigham and Women’s Hospital 1-hour lecture per year
2020–2021	MGH/McLean Adult Psychiatry Residency noon conferences	Massachusetts General Hospital 1-2.5 hours per year
2021–	Health Policy Course, Department of Medicine Health Policy Concentration	Massachusetts General Hospital 4-5 3-hour sessions per year

### **Clinical Supervisory and Training Responsibilities:**

2018–	Inpatient attending physician on the Bigelow house staff teaching service	Massachusetts General Hospital 4 weeks per year
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**Laboratory and Other Research Supervisory and Training Responsibilities:**

2017–	Supervision of medical/doctoral student research and training, Harvard Medical School	2 1-hour meetings per month and 1:1 supervision 1-2 hours per month
2017–2022	Supervision of research assistants training and protocol, Harvard Medical School	1 hour meeting per week and 1:1 supervision 1 hour per week
2018–2019	Supervision of summer students research and training, Harvard Medical School	1 hour meeting per week and 1:1 supervision 1 hour per week
2023–	Song/Zubizarreta lab, Harvard Medical School	2 1-hour lab meetings per month

**Formally Mentored Harvard Medical, Dental, and Graduate Students:**

2017–2021	Suhas Gondi, M.D., M.B.A., Internal Medicine resident, BWH <ul style="list-style-type: none"> <li>• Mentoring role: research advisor and collaborator</li> <li>• Papers: <a href="#">Health Affairs Blog</a> (2019), <a href="#">JAMA</a> (2019, 2019), <a href="#">AJMC</a> (2019), <a href="#">JAMA IM</a> (2020), <a href="#">JAMA Health Forum</a> (2021, 2021), <a href="#">JGIM</a> (2022)</li> </ul>	
2018–2020	Yunan Ji, Ph.D., Assistant Professor, Georgetown University <ul style="list-style-type: none"> <li>• Mentoring role: research advisor and collaborator</li> <li>• Paper: <a href="#">NEJM</a> (2019)</li> </ul>	
2018–2020	Mubeen Shakir, M.D., M.Sc., Associate VP of Clinical Innovation, Univ of Oklahoma <ul style="list-style-type: none"> <li>• Mentoring role: research advisor for HMS scholarly project (thesis) “Differences in Health and Health Care between Rural and Urban America,” which was awarded the HMS Leon Eisenberg Prize for Medicine in Society Research (2019)</li> </ul>	
2018–2022	Joseph Bruch, Ph.D., Assistant Professor, University of Chicago <ul style="list-style-type: none"> <li>• Mentoring role: chair, dissertation committee</li> <li>• Papers: <a href="#">JAMA Intern Med</a> (2020, 2020), <a href="#">Ann Intern Med</a> (2020), <a href="#">JAMA Health Forum</a> (2021, 2022), <a href="#">AJPH</a> (2021), <a href="#">BMJ</a> (2021)</li> </ul>	
2018–	Jason Buxbaum, Ph.D., incoming Assistant Professor, Brown University <ul style="list-style-type: none"> <li>• Mentoring role: dissertation committee</li> </ul>	
2019–2023	Shivani Shah, M.D., M.B.A., Surgery Resident, Northwestern Medicine <ul style="list-style-type: none"> <li>• Mentoring role: research advisor and collaborator</li> <li>• Papers: <a href="#">JAMA Health Forum</a> (2020), <a href="#">JGIM</a> (2021), <a href="#">Health Affairs Blog</a> (2021)</li> </ul>	
2020–2021	Garret Johnson, M.D., Internal Medicine resident, Duke <ul style="list-style-type: none"> <li>• Mentoring role: HMS scholarly project mentor</li> </ul>	
2022	Kushal Kadakia, M.D. candidate, HMS <ul style="list-style-type: none"> <li>• Mentoring role: research advisor and collaborator</li> <li>• Papers: <a href="#">Milbank Quarterly Opinion</a> (2022)</li> </ul>	

**Other Mentored Trainees and Faculty:**

2013–2017	Andrew P. Loehrer, M.D., M.P.H., Assistant Professor, Dartmouth-Hitchcock <ul style="list-style-type: none"> <li>• Mentoring role: research advisor and collaborator</li> <li>• Papers: <a href="#">JAMA Surg</a> (2013, 2017), <a href="#">Ann of Surg</a> (2015, 2016), <a href="#">J Am Coll Surg</a> (2015), <a href="#">J Clin Oncol</a> (2016), and <a href="#">J Oncol Pract</a> (2017)</li> </ul>	
2014–2015	John W. Scott, M.D., M.P.H., Associate Professor, University of Washington <ul style="list-style-type: none"> <li>• Mentoring role: research advisor and collaborator</li> <li>• Papers: <a href="#">Health Affairs</a> (2015), <a href="#">J Am Coll Surg</a> (2015)</li> </ul>	
2018 Summer	Carol Tao, while as B.A. candidate, New York University <ul style="list-style-type: none"> <li>• Mentoring role: research advisor</li> </ul>	
2018 Summer	William Tian, while as M.D. candidate, University of Illinois College of Medicine <ul style="list-style-type: none"> <li>• Mentoring role: research advisor</li> </ul>	
2018–2019	Cian P. McCarthy, M.B., B.Ch., B.A.O., Cardiologist, MGH	

- Mentoring role: research advisor and collaborator
  - Papers: Journal of the American College of Cardiology (2018), Circulation (2018)
- 2018–2019 Arielle Elmaleh-Sachs, M.D., Assistant Professor, New York University
- Mentoring role: research advisor
- 2018– Sneha Kannan, M.D., Pulmonary/Critical Care Fellow, BIDMC and MGH
- Mentoring role: fellowship research mentor and collaborator
  - Papers: JAMA (2023), Health Affairs (2023), JAMA Health Forum (2021, 2023), Health Affairs Scholar (2024), Critical Care Medicine (2024)
  - 2 manuscripts under review
- 2018– Samuel J. Enumah, M.D., General Surgery resident, Brigham and Women’s Hospital
- Mentoring role: research advisor and collaborator
- 2018–2021 Nicole Benson, M.D., Child and Adolescent Psychiatrist, McLean Hospital and MGH
- Mentoring role: research advisor and collaborator
  - Papers: JGIM (2020), Health Affairs (2020), JGIM (2021)
- 2018–2022 Thomas Roberts, M.D., M.B.A., Head and Neck Oncologist, MGH
- Mentoring role: research advisor and collaborator
  - Papers: JAMA Health Forum (2022)
- 2019 Summer Neeti Kulkarni, Ph.D. Candidate, University of Michigan School of Public Health
- Mentoring role: research advisor and collaborator
- 2019–2022 Lindsey J. Patterson, Ph.D., RAND Corporation
- Mentoring role: research advisor and collaborator
  - Papers: JAMA Health Forum (2021), 1 manuscript under peer review
- 2023– Christopher Cai, M.D., General Medicine Fellow, Harvard Medical School
- Mentoring role: research advisor and collaborator
  - Papers: JAMA (2023), Health Affairs (2024)
- 2023– Michael Anne Kyle, Ph.D., R.N., Research Fellow, HMS
- Mentoring role: research collaborator
  - Papers: NEJM (2023)
- 2024– Nishant Uppal, M.D., M.B.A., Internal Medicine resident, BWH
- Mentoring role: research collaborator
  - Papers: NEJM (2024)
- 2024– George Karandinos, M.D., Ph.D., General Medicine Fellow, HMS
- Mentoring role: research collaborator
  - 1 manuscript under review

**Report of Local Invited Presentations:**

***No presentations below were sponsored by outside entities***

- 4/2006 “Smoking and Obesity: The Public Health Crises of Our Generation,” Woodrow Wilson Fellowship Ceremony, Johns Hopkins University, Baltimore, MD
- 7/2012 “Next Steps in Health Care Reform: Transitioning to Accountable Care,” Principal Clinical Experience Intersession, Harvard Medical School, Boston, MA
- 7/2012 “Early Experience with Accountable Care in Massachusetts,” Meet the Expert Seminar Series, Harvard School of Public Health, Boston, MA
- 9/2013 “Clinical Decision-Making and Health Care Spending,” MD-PhD Grand Rounds, Harvard
- 10/2013 “Improving the Value of American Health Care: Policy Options,” 31th Annual Retreat, MD-PhD Program, Harvard Medical School, Boston, MA
- 10/2015 “Health Care Spending and Quality Under Global Payment,” Netherlands Delegation, Harvard T.H. Chan School of Public Health, Boston, MA
- 12/2013 “Slowing the Growth of Health Care Spending,” Tufts Medical Center, Boston, MA
- 2/2016 “Strategies for Slowing Health Care Spending,” Harvard School of Public Health
- 10/2016 “Strategies to Slow the Growth of Health Care Spending,” Harvard Medical School
- 10/2016 “Strategies to Slow Health Care Spending,” DGIM, Massachusetts General Hospital

2/2017	“Health Care and the Affordable Care Act after the Election,” Department of Psychiatry, Massachusetts General Hospital, Boston, MA
5/2017	“The Changing Mortality and Composition of Opioid-Related Hospitalizations Versus Other Hospitalizations in the US,” DGIM Medical Rounds Conference, Mass General Hospital
9/2017	“The Impact of Workplace Wellness Programs on Health and Economic Outcomes,” Harvard School of Public Health, Boston, MA
10/2017	“Health Care Policy in 2020,” Primary Care in 2020 Conference, Harvard Medical School
2/2018	“Policies to Address Health Care Spending and Value,” Department of Population Medicine, Harvard Medical School and Harvard Pilgrim Health Care Institute, Boston, MA
3/2018	“Fixing Prices or Price Fixing? Physician Responses to New Payments for Heart Disease Treatments,” Harvard Medical School, Boston, MA
5/2018	“A Guide to Research in Health Policy,” Medical Directors’ Meeting, Population Health Management, Partners Healthcare, Boston, MA
6/2018	“The Impact of Changes in Medicare Physician and Hospital Outpatient Fees,” Division of General Internal Medicine, Massachusetts General Hospital, Boston, MA
7/2018	“The Impact of Medicare PCI Fee Changes on Provider Behavior,” Smith Center for Outcomes Research in Cardiology, Beth Israel Deaconess Medical Center, Boston, MA
9/2018	“Meet the Investigator” Seminar, MD-PhD Program, Harvard Medical School, Boston, MA
10/2018	“Impact of Workplace Wellness on Health and Economic Outcomes: A Randomized Controlled Trial,” Harvard Medical School, Boston, MA
4/2019	“Impact of Changes in Medicare Prices for PCI,” Cath Conference, Mass General Hospital
4/2019	“Changes in Economic and Clinical Outcomes Under CMS Mandatory Bundled Payments for Joint Replacements,” Division of General Internal Medicine, Mass. General Hospital
5/2019	“Impact of Workplace Wellness on Health and Economic Outcomes: A Randomized Controlled Trial,” DGIM Medical Rounds Conference, Massachusetts General Hospital
6/2019	“Health Care: An Endangered Species?” Alumni Day Symposium, Harvard Medical School
6/2019	“Policy Options to Address Health Care Spending,” Center for Primary Care, HMS
9/2019	“Health Care Spending and Quality 8 Years into Global Payment,” Healthcare Markets & Regulations Lab Industry Working Group Summit, Harvard Medical School, Boston, MA
11/2019	“Improving the Value of Health Care,” 45th Anniversary Reunion and Celebration Harvard/MIT Medical Scientist Training Program, Harvard Medical School, Boston, MA
3/2022	“Medicare Advantage and Payment Reform,” Population Health Medical Directors Meeting, Mass General Brigham, Boston, MA
4/2022	“Improving the Value of Health Care,” Grand Rounds, Department of Pediatrics, Cambridge Health Alliance, Cambridge, MA
5/2022	“Health Policy Through the Lens of Health Equity,” Harvard Medical Grand Rounds on “Race, Income, and Health Equity: From Insight to Action”, Boston, MA
8/2022	Meet the Investigator, Harvard-MIT MD-PhD Program, Boston, MA
4/2023	“The Health and Economics of Gun Violence,” GSAS Alumni Day, Harvard University
10/2023	“Corporate Medicine,” Health Coverage Fellowship, Wellesley, MA
10/2023	“Private Equity in Health Care,” Industry Working Group, Harvard Medical School
11/2023	“Private Equity Acquisitions in Health Care: Trends, Impact, and Policy Levers,” Healthcare Policy Leadership Council, Harvard Kennedy School, Cambridge, MA
11/2023	“Private Equity in Health Care: Trends, Impact, and Policy,” DGIM Grand Rounds, MGH
1/2024	“Financial Incentives in Health Care Delivery,” The Mongan Institute, MGH
2/2024	“MGH Primary Care Payment Reform,” Pediatrics Compensation Task Force, MGH

## **Report of Regional, National, and International Invited Teaching and Presentations**

***No presentations below were sponsored by outside entities***

### **Regional**

10/2009	“Health Care Reform and the Social Sciences,” 27th Annual Student Faculty Retreat, MD-PhD Program, Harvard Medical School, Waterville Valley, NH
3/2011	“Health Care Reform,” Boston University School of Medicine, Boston, MA

8/2011 "Effect of the AQC on Health Care Spending and Quality," Massachusetts Health Care Quality and Cost Council, Boston, MA

1/2012 "A Primer on Health Care Reform," Albert Schweitzer Fellowship, Boston, MA

2/2012 "Changing Paradigms in Healthcare: What Does the Future Hold?" Massachusetts Medical Society Physician Leadership Institute, Boston, MA

4/2012 "Year-2 Evaluation of the Alternative Quality Contract," The Dartmouth Institute for Health Policy and Clinical Practice, Lebanon, NH

6/2013 "The Return-on-Investment of Wellness: Evidence and Policy," New England Employee Benefits Council, Waltham, MA

12/2013 "Slowing the Growth of Health Care Spending" Tufts Medical Center, Boston, MA

4/2014 "Payment Reform in Massachusetts: Early Evidence on Spending and Quality," Dartmouth Symposium in Health Care Delivery Science, Hanover, NH

7/2014 "Program Evaluation and ROI: Evidence and Policy," Best Practices in Worksite Wellness Conference, Braintree, MA

11/2014 "Health Care Spending and Quality 4 Years into Global Payment for ACOs" (selected abstract), American College of Physicians Annual Scientific Meeting, Waltham, MA

3/2015 "Medicare Fee Cuts and Physician-Hospital Integration" (selected abstract), New England Society of General Internal Medicine (SGIM) Regional Meeting, Boston, MA

4/2015 "The Emergence of Worksite Wellness in Health Policy" The Business of Worksite Wellness and Nutrition Conference, Rockland, MA

10/2015 "Evaluations of Public and Private Strategies for Improving the Value of Health Care Spending," Health Policy Commission, Boston, MA

3/2016 "Changes in Quality and Spending for High versus Low SES Populations Under Global Payment" (selected abstract), New England SGIM Meeting, New Haven, CT (Plenary)

4/2016 "Improving the Evidence Base on Worksite Wellness," Third Annual Emerging Trends in Wellness Conference, Randolph, MA

5/2016 "Mortality Among Opioid-Related vs. Other Hospitalizations in the U.S.," Health Policy Commission, Boston, MA.

3/2017 "Mortality and Composition of Opioid Hospitalizations in the United States" (selected abstract), New England Society of General Internal Medicine (SGIM) Meeting, Boston, MA

4/2017 "Changes in Quality of Care and Medical Spending for High versus Low Socioeconomic Status Populations under Global Payment," Health Policy Commission, Boston, MA

4/2017 "An Update on the Evidence Base for Workplace Wellness," Fourth Annual Emerging Trends in Wellness Conference, Randolph, MA

3/2018 "Policies to Address Health Care Spending," Health Policy Seminar, Institute for Clinical Research and Health Policy Studies, Tufts Medical Center, Boston, MA

4/2018 "Impact of Workplace Wellness on Health and Economic Outcomes," Fifth Annual Emerging Trends in Wellness Conference, Randolph, MA

2/2019 "Current State of Health Care Policy in the United States," Whitney Center, Hamden, CT

2/2019 "ACOs in Massachusetts: the AQC Experience," MassHealth, Executive Office of Health and Human Services, Commonwealth of Massachusetts

3/2019 "Physician Scientists and the Health Care Economy," (Clinical and Population Health Keynote), UMass Medical School, MD/PhD Program, 14th Annual Retreat, Worcester, MA

1/2021 "Peer Effects and Health Care Consumption: Evidence from Spousal Health Shocks," Columbia University Mailman School of Public Health (virtual)

3/2021 "Payment for Primary Care," Health Care Delivery Transformation Conference, Healthcare Financial Management Association, Massachusetts-Rhode Island Chapter (virtual)

2/2022 "Disparities in COVID-19," Massachusetts Consortium on Pathogen Readiness (virtual)

8/2022 "Health Care Financing and the Pandemic," Harvard/MIT MD-PhD Program (virtual)

9/2022 "Utilization, Prices, and Outcomes in U.S. Intensive Care Units" (selected abstract), New England Society of General Internal Medicine (SGIM) Meeting, Boston, MA (Plenary)

10/2022 "Saving Primary Care: Insights from Evidence," Global Health and Service Advisory Council Meeting, Harvard Medical School, Boston, MA

3/2023 "Primary Care and Financial Risk," Health Policy Commission, Boston, MA.

- 12/2023 "Private Equity in Health Care" Health Policy Commission Board Meeting, Boston, MA
- National**
- 12/2005 "Undergraduate public health education: Role of the student-run publication" (selected abstract), American Public Health Association Meeting, Philadelphia, PA
- 11/2009 "The Albert Schweitzer Fellowship," PRI-MED Conference, Boston, MA
- 6/2010 "Using the Dartmouth Atlas" (selected abstract), AcademyHealth ARM, Boston, MA
- 8/2010 "Health Care Reform 2010: Policies and Objectives," Carolinas Medical Center, NC
- 10/2010 "Health Care Reform 2010: Policies and Objectives," 4th Annual Albert Schweitzer Fellowship Conference, Baltimore, MD
- 6/2011 "Effect of the AQC on Health Care Spending and Quality" (selected abstract), 17th Annual National Research Service Award (NRSA) Trainees Research Conference, Seattle WA
- 6/2011 "The Effect of Global Payment in Accountable Care Organizations on Health Care Costs" (selected abstract), AcademyHealth Annual Research Meeting, Seattle, WA
- 10/2011 "Health Care Reform and its Implications," 5th Annual Albert Schweitzer Fellowship Conference, Boston, MA
- 11/2011 "Effect of the AQC on Health Care Spending and Quality" (selected abstract), Gerontological Society of America, 64th Annual Meeting, Boston, MA
- 1/2012 "Effect of the AQC on Health Care Spending and Quality" (selected abstract), American Economic Association/Allied Social Science Associations, Chicago, IL
- 6/2012 "Year-2 Evaluation of the Alternative Quality Contract" (selected abstract), 18th Annual National Research Service Award (NRSA) Trainees Research Conference, Orlando, FL
- 6/2012 "Year-2 Evaluation of the Alternative Quality Contract" (selected abstract), Health Economics Interest Group, AcademyHealth Annual Research Meeting, Orlando, FL
- 6/2012 "Unintended Consequences of Redistributing Income from Specialists to Primary Care Physicians in Medicare" (selected abstract), AcademyHealth ARM, Orlando, FL
- 6/2012 "Effect of the Alternative Quality Contract on Health Care Spending and Quality: Year-2 Results" (selected abstract), AcademyHealth Annual Research Meeting, Orlando, FL
- 6/2013 "Year-2 Evaluation of the Alternative Quality Contract" (Article-of-the-Year session), AcademyHealth Annual Research Meeting, Baltimore, MD
- 2/2014 "Slowing the Growth of Health Care Spending: Evaluations of Current Policy Approaches," Institute for Healthcare Policy and Innovation (IHPI), University of Michigan, Ann Arbor, MI
- 4/2014 "Conducting ROI Analysis," Health Care Innovations Exchange: Virtual Roundtable on Return on Investment, Agency for Healthcare Research and Quality (AHRQ)
- 4/2014 "Payment Reform in Massachusetts: Effect of Global Payment on Health Care Spending and Quality 4 Years into the AQC" (selected abstract), SGIM Annual Meeting, San Diego
- 11/2014 "Health Care Spending and Quality 4 Years into Global Payment for ACOs," Grand Rounds, Division of General Internal Medicine, Johns Hopkins Medicine, Baltimore, MD
- 6/2015 "Medicare Fee Cuts and Physician-Hospital Integration" (selected abstract), AcademyHealth Annual Research Meeting, Minneapolis, MN
- 12/2015 "Evaluating Strategies for Improving the Value of Health Care Spending" Perelman School of Medicine, University of Pennsylvania, Philadelphia, PA
- 5/2016 "Changes in Quality of Care and Medical Spending for High vs Low Socioeconomic Status Populations under Global Payment" (selected abstract), SGIM Annual Meeting (Plenary)
- 6/2016 "Policy Rationale and Implications of Payment Reform," American Diabetes Association 76th Scientific Sessions, New Orleans, LA
- 7/2016 "Leadership in the Field of Medicine" (keynote), National Youth Leadership Forum on Medicine, Wellesley, MA
- 9/2016 "Competitive Bidding in Medicare Advantage," Congressional Budget Office, Panel of Health Advisors, Washington, DC
- 11/2016 "Frameworks in Health Policy and Health Economics," The MedX Program University of Pennsylvania, Philadelphia, PA
- 11/2016 "Strategies for Slowing Health Care Spending: Implications for Health Systems," Innovation Speaker Series, Center for Health Care Innovation, UPenn Health System

11/2016 "Implications of the Election for Health Care Reform," Penn HealthX, Perelman School of Medicine, University of Pennsylvania, Philadelphia, PA

11/2016 "Medicare Financing Reform after the Election," Division of General Internal Medicine, Perelman School of Medicine, University of Pennsylvania, Philadelphia, PA

2/2017 "Mobile Health and Wellness: Return-on-Investment," Expert Series: Mobile Health Clinics—Meeting Your Employees Where They Are. Health Resources in Action Webinar.

4/2017 "The Changing Mortality and Composition of Opioid-Related Hospitalizations Versus Other Hospitalizations in the United States" (selected abstract), SGIM Annual Meeting, DC

4/2017 "Medicare Advantage Benchmarks, Bids, and Rebates Before and After the Affordable Care Act" (selected abstract), SGIM Annual Meeting, Washington, DC

6/2017 "Mortality and Composition of Opioid Hospitalizations in the United States" (selected abstract), AcademyHealth Annual Research Meeting, New Orleans, LA

7/2017 "Making Positive Change Through Medicine and Health Care" (Keynote), National Youth Leadership Forum on Medicine, Wellesley, MA

4/2018 "Health Care Spending and Quality 8 Years into Global Payment" (selected abstract), Society of General Internal Medicine (SGIM) 2018 Annual Meeting, Denver, CO

6/2018 "Payments to Medicare Advantage Plans and Plan Generosity Before and After the Affordable Care Act" (selected abstract), American Society of Health Economists, Atlanta

6/2018 Discussant for "Vertical Integration and a Changing Physician Workforce," American Society of Health Economists Conference, Atlanta, GA

6/2018 "The Impact of Workplace Wellness on Health, Health Care, and Employment Outcomes: A RCT" (selected abstract), American Society of Health Economists Conference, Atlanta

6/2018 Discussant for "Did Medicare Advantage Payment Cuts Affect Beneficiary Access to Care?" American Society of Health Economists Conference, Atlanta, GA

6/2018 "Changes in Health Care Spending and Quality 8 Years into Global Payment" (selected abstract), AcademyHealth Annual Research Meeting, Seattle, WA

7/2018 "Making Positive Change Through Medicine and Health Care" (Keynote), National Youth Leadership Forum on Medicine, Wellesley, MA

5/2019 "Putting Patients First" (Panelist), The State of Care: Future of Medicare, The Atlantic, DC

5/2019 "Impact of Workplace Wellness on Health and Economic Outcomes: A Randomized Controlled Trial" (selected abstract), SGIM Annual Meeting, Washington, DC (Plenary)

5/2019 "Changes in Economic and Clinical Outcomes Under CMS Mandatory Bundled Payments for Joint Replacements" (selected abstract), SGIM 2019 Annual Meeting, Washington, DC

6/2019 "Changes in Economic and Clinical Outcomes Associated with CMS Mandatory Bundled Payments for Joint Replacements" (selected abstract), AcademyHealth ARM, Wash., DC

6/2019 "Spending on out-of-Network Care in the United States, 2008-2016" (selected abstract), AcademyHealth Annual Research Meeting, Washington, DC

6/2019 "Health Care Spending and Quality 8 Years into Global Payment" (selected abstract), American Society of Health Economists Conference, Washington, DC

6/2019 "The Impact of Fee Changes on Provider Behavior" (selected abstract), American Society of Health Economists Conference, Washington, DC

7/2019 "Making Positive Change Through Medicine and Health Care" (Keynote), National Youth Leadership Forum on Medicine, Boston, MA

9/2019 "Improving the Evidence Base to Inform Health Policy," NCCIH at 20: A Catalyst for Integrative Health Research, National Institutes of Health, Bethesda, MD

10/2019 "Navigating Mixed Payments: What is the Argument to Increase Primary Care Spend?" 2019 Primary Care Conference, Boston, MA

7/2020 "Social Learning and Health Care Utilization: Evidence from Spousal Health Shocks" (selected abstract), AcademyHealth Annual Research Meeting (virtual live plenary)

7/2020 "Changes in Prescription Drug Spending and Utilization 8 Years into Global Payment" (selected abstract), AcademyHealth Annual Research Meeting (virtual)

12/2020 "Peer Effects and Health Care Consumption: Evidence from Spousal Health Shocks" (selected abstract), Fifth Annual Population Health Science Research Workshop (virtual)

3/2021 “Overview of Insurance Markets and Reimbursement for Care,” American Psychiatric Association Annual Meeting (virtual)

6/2021 “Hospitalizations, Mortality, and Racial/Ethnic Disparities in the COVID-19 Pandemic,” (selected abstract), National Bureau of Economic Research (virtual)

6/2021 “Peer Effects and Health Care Consumption: Evidence from Spousal Health Shocks,” (selected abstract), American Society of Health Economists Conference (virtual)

6/2021 Discussant for “Private Equity, Consumers, and Competition: Evidence from the Nursing Home Industry,” American Society of Health Economists Conference (virtual)

6/2021 Discussant for “The Role of Improvement and Consolidation in Medicare Advantage Quality Ratings,” American Society of Health Economists Conference (virtual)

6/2021 “Effect of Traditional Medicare and Medicare Advantage on Spending, Use, and Price” (selected abstract), American Society of Health Economists Conference (virtual)

7/2021 “What Works in Wellness?” (Panelist), 36th Annual National MD-PhD Student Conference, University of Colorado Anschutz Medical Campus (virtual)

7/2021 “Peer Effects and Health Care Consumption: Evidence from Spousal Health Shocks,” (selected abstract), National Bureau of Economic Research Summer Institute (virtual)

9/2021 “Primary Care and Behavioral Health Investment for Maine,” Maine Medical Association and Joint Committee on Health Coverage, Insurance and Financial Services (virtual)

10/2021 “Low Value Care Measures and Physician-Level Variations,” Industry Working Group Summit, Health Care Markets and Regulation Lab, Harvard Medical School (virtual)

10/2021 “Improving the Value of Care: A Policy Landscape,” Department of Medicine Grand Rounds, Memorial Sloan Kettering Cancer Center (virtual)

11/2021 “Peer Effects in Health Care Consumption: Evidence from Family Health Shocks,” Health Policy Seminar, Indiana University (virtual)

11/2021 “Considering the Role of Private Equity in U.S. Health Care,” NYU Langone Health (virtual)

12/2021 “Improving Wellness in the Workplace: A Randomized Controlled Trial” (roundtable), Office of the U.S. Surgeon General, U.S. Department of Health and Human Services

12/2021 “Medicare’s Future: Improving Health Equity and Implications for Employers,” National Academy of Social Insurance, New England Council, Massachusetts Hospital Association

1/2022 “Hospitalizations, Mortality, and Racial/Ethnic Disparities in the COVID-19 Pandemic” (selected abstract), American Economic Association Annual Meeting (virtual)

4/2022 “The Pandemic & Low Value Care,” Low-Value Care Task Force, VBID Health (virtual)

6/2022 “New Weighting Methods” (with Jose Zubizarreta and James O’Malley), AcademyHealth Annual Research Meeting, Washington, DC

8/2022 “Health Care Financing and the Pandemic,” Grand Rounds, Mercy Hospital, St. Louis, MO

9/2022 “Understanding Health Shocks—Economic and Clinical Effects,” Department of Population Health Sciences, Weill Cornell Medicine, New York, NY

12/2022 “Primary Care and Financial Risk,” Association of Chiefs & Leaders of General Internal Medicine (ACLGIM) Winter Summit (Keynote)

3/2023 “Demographic and Clinical Factors Associated with Long COVID,” *Health Affairs* Briefing

4/2023 “Achieving Whole Health: A New Approach for Veterans and the Nation” (with National Academies of Sciences, Engineering, and Medicine committee), Briefing for CMS

5/2023 “Clinical and Economic Impact of Child and Adolescent Firearm Injuries on Survivors and Family Members” (selected abstract), SGIM 2023 Annual Meeting, Denver, CO

5/2023 “Changes in Hospitalization Outcomes Among Private Equity (PE) and Non-PE Hospitals During the COVID-19 Pandemic” (selected abstract), SGIM 2023 Annual Meeting, Denver

5/2023 “Private Equity Acquisitions in Health Care: Trends, Evidence, and Policies,” National Institute of Health Care Management (NIHCM) Board Meeting, Washington, DC

5/2023 “Private Equity Acquisitions in Health Care: Evidence and Policy Levers” (Part 1), Center for Medicare and Medicaid Innovation (virtual)

6/2023 “Understanding the Growth & Influence of Private Equity in Health Care” (with Atul Gupta, Jane Zhu, and Erin Fuse Brown), National Institute of Health Care Management webinar

6/2023 “Private Equity Pushes into Healthcare” (with Alex Azar, Eileen O’Grady, and Alan Weil), Aspen Ideas Health, Aspen, CO

- 6/2023 “Clinical and Economic Impact of Child and Adolescent Firearm Injuries on Survivors and Family Members” (selected abstract), AcademyHealth, Seattle, WA (Best of ARM)
- 6/2023 “Changes in Hospitalization Outcomes Among Private Equity (PE) and Non-PE Hospitals During the COVID-19 Pandemic” (selected abstract), AcademyHealth (Best of ARM)
- 8/2023 “Private Equity Acquisitions in Health Care: Evidence and Policy Levers” (Part 2), Center for Medicare and Medicaid Innovation (virtual)
- 8/2023 “Privatization in Health Care: Pace, Promise, & Pitfalls,” National Academies of Sciences, Engineering, and Medicine (NASEM) Health Care Expenditure Collaborative (virtual)
- 8/2023 “Privatization in Health Care: Pace, Promise, & Pitfalls,” National Academy for State Health Policy (NASHP) 36<sup>th</sup> Annual Conference, Boston, MA (Plenary)
- 9/2023 “The Health Care Economy: An Evolving Landscape,” Senate Legislative Day, Oregon
- 9/2023 “Privatization in Health Care: Pace, Promise, & Pitfalls,” Office of Health Strategy, CT
- 11/2023 “Primary Care and Private Equity,” Executive Office of the President, White House (virtual)
- 11/2023 “Reforming Medicare Advantage to Deliver on Its Promise,” Penn LDI (virtual)
- 11/2023 “Private Equity in Health Care,” National Academy for State Health Policy webinar (virtual)
- 11/2023 “A Journey in Health Care Spending,” The Commonwealth Fund (virtual)
- 12/2023 “Private Equity in Health Care: Trends, Impact, and Policy,” Office of the Assistant Secretary for Planning and Evaluation (ASPE), Dept of Health and Human Services, DC
- 1/2024 “Financial Incentives in Health Care,” National Clinician Scholars Program, Yale University
- 2/2024 “Financial Incentives in the Delivery System,” University of Minnesota
- 4/2024 “Private Equity in Health Care: A Policy Framework,” National Academies of Sciences, Engineering, and Medicine (NASEM) Board on Health Care Services, Washington, DC
- 5/2024 “Economic and clinical impact of firearm injuries,” Niskanen Center and UConn ARMS, DC
- 6/2024 “Clinical Quality and Patient Outcomes after Private Equity Acquisition: Evidence from U.S. Hospitals,” American Society of Health Economists Conference, San Diego
- 6/2024 Discussant for “Enrollment in Medicare Is Associated with Fewer Mental Healthcare Visits,” American Society of Health Economists Conference, San Diego
- 6/2024 “The Financialization of Health,” American Society of Health Economists, San Diego

### **International**

- 7/2011 “The Effect of Global Payment in ACOs on Health Care Costs” (selected abstract) International Health Economics Association (iHEA), Toronto, Canada
- 5/2018 “Paying for Value: From Theory to Practice,” in Funding for Value session (chair), Shifting to Value-Based Health Care conference, International Consortium for Health Outcomes Measurement and Université Paris Cité, France
- 12/2019 “Transparency in Incentives: Outcome-Based Payments,” EIT Health Summit 2019, European Institute of Innovation & Technology, European Union, France (Plenary)
- 3/2021 “Health Policy in the United States” (invited lecture), Chair of Innovation and Value in Health, Université Paris Cité (virtual)
- 6/2021 “Incentivising wellness in the workplace: a randomized controlled trial” (invited lecture), Food Matters Live 2021, United Kingdom (virtual)
- 3/2022 “Innovations in Payment Systems in the U.S.” (invited lecture), Health in the XXI Century: Workshop for Latin American Health Care Executives, Boston, MA
- 5/2022 “Payment Reform and Accountable Care: Insights and Lessons from the U.S.” (invited lecture), Leiden University Medical Center, The Hague, Netherlands (Keynote)
- 10/2022 “Health Policy in the United States” (invited lecture), Chair of Innovation and Value in Health, Université Paris Cité (virtual)
- 6/2023 “Insurer–Provider Contracting” (invited lecture, session chair), Transforming Health Systems with Patient Outcomes, International Conference, Université Paris Cité, France

### **Report of Clinical Activities and Innovations**

#### **Current Licensure and Certification:**

2014–2017 Commonwealth of Massachusetts, Board of Registration in Medicine, Limited License

2017– Commonwealth of Massachusetts, Board of Registration in Medicine, Active License  
2019– Board Certification, American Board of Internal Medicine

**Practice Activities:**

2017– Primary care practice Internal Medicine Associates, MGH 2 sessions per week  
2017– Inpatient attending Department of Medicine, MGH 4 weeks per year  
(Bigelow teaching service)

**Report of Education of Patients and Service to the Community**

**Education of Patients and Service to the Community:**

2006–2008 Mentor, Harvard Manville Mentoring Program, The Manville School, Boston, MA  
(volunteered as a big brother mentor at the school, 2 hours per week)

2007–2008 Boston Fellow, Albert Schweitzer Fellowship, (helped establish an after-school physical activity and nutrition program for at-risk youth with colleagues at the Brookside Community Health Center, Jamaica Plain, MA. 200 service hours.)

2008–2012 Resident Tutor, Cabot House, Harvard College  
Primary service: Pre-Medicine Committee (advising pre-medical students, writing committee letters for medical schools, and holding mock interviews).  
Secondary service: tutoring in economics, organic chemistry, and careers.

2013–2014 Copy editor (pro bono), Goroll AH, Mulley AG, eds. “Primary Care Medicine: Office Evaluation and Management of the Adult Patient, 7th Edition.” Lippincott Williams & Wilkins and Wolters Kluwer, 2014.

2/2017 Expert for online resident Q&A forum, New England Journal of Medicine Resident 360, in public group discussion “From Volume to Value: Understanding the Impact of ACOs and New Care Models in Healthcare.”

9/2017 Introduction and moderator, “Alternative Models at the State and Federal Levels,” *It Depends What State You’re In: Policies and Politics of the US Health Care System*, Radcliffe Institute for Advanced Study, Harvard University

11/2017 Participant, Data Science Rountable, “Key Factors for Scientific Impact on Policy,” Harvard Data Science Initiative and Elsevier

3/2019 Health Policy career paths program, Office of Career Services, Faculty of Arts and Sciences, Harvard University

3/2019 “Care at the End of Life: Toward a Roadmap for Plans” (Lecture), International Foundation of Employee Benefit Plans, St. Petersburg, FL

4/2019 “Wellness Wednesday: Workplace Wellness” (Podcast), All Sides with Ann Fisher, 89.7 National Public Radio News, WOSU, Ohio

4/2019 “Do workplace wellness programmes work?,” Early Edition, Newstalk ZB, New Zealand

4/2019 “Do workplace wellness programs work?,” ABC Radio National, Sydney, Australia

5/2019 “Impact of Workplace Wellness on Health and Economic Outcomes” (Webinar), Health Enhancement Research Organization

5/2019 “Impact of Workplace Wellness on Health and Economic Outcomes” (Webinar), WELCOA and National Wellness Institute

12/2019 Participant, “Implementation and De-implementation Methodologies for Complementary and Integrative Health Approaches” meeting, National Center for Complementary and Integrative Health, National Institutes of Health

6/2020 Preliminary data posted for state policymakers: “Economic and Clinical Impact of COVID-19 on Provider Practices in Massachusetts: Interim Results: May 20 – June 17, 2020.” Health Policy Commission, Commonwealth of Massachusetts

4/2022 “Emerging Policy Opportunities for Community-Based Serious Illness Care” (Moderator), Petrie-Flom Center for Health Law Policy, Biotechnology, and Bioethics, Harvard Law School, and Coalition to Transform Advanced Care

1/2024 “Gun Violence: The Impact on Society” Infographic, NIHCM Foundation

2/2024 “Private Equity Acquisitions of Health Care Providers: A Review of the Evidence,” ISMIE

## Recognition

2009	Top Doctors (Boston Medical Students)	Boston Magazine
2014	30 Under 30 in Science and Healthcare	Forbes Magazine

## Research Citations and Coverage:

### Research Cited in Government Testimony or Policy

- Testimony of David M. Cutler, PhD, Committee on the Budget, U.S. Senate (2/29/2012)
- Testimony of Dana Gelb Safran, ScD, Committee on Finance, U.S. Senate (6/14/2012)
- Department of Health and Human Services, *Federal Register* Vol 77, No 179 (9/14/2012)
- Testimony of David Blumenthal, MD, MPP, Special Committee on Aging, U.S. Senate (2/27/2013)
- Testimony of Leemore S. Dafny, PhD, Committee on the Judiciary, U.S. Senate (9/22/2015)
- Testimony of Andrew Kolodny, MD, Committee on Homeland Security and Governmental Affairs, U.S. Senate (1/17/2018)
- Testimony of Matthew Fiedler, PhD, Committee on Finance, U.S. Senate (5/8/2019)
- Testimony for H4134 - An Act to improve health care by investing in VALUE, Joint Committee on Health Care Financing, Commonwealth of Massachusetts (1/28/2020)
- The Economic Toll of Gun Violence, U.S. Congress Joint Economic Committee (7/20/2022)
- Testimony for "Private Capital, Public Impact: An FTC Workshop on Private Equity in Health Care," Federal Trade Commission (3/5/2024)
- Testimony for "Examination of the Effects of Private Equity Ownership and Investment in Health Care," Massachusetts Joint Committee on Health Care Financing (3/25/2024)

### Research Covered by Newspaper or News Articles

U.S. outlets: *New York Times, Washington Post, Wall Street Journal, Bloomberg, Reuters, CNN, LA Times, US News & World Report, USA Today, PBS Newshour, CNBC, Boston Globe, TIME, Kaiser Health News, NPR, WBUR, Scientific American, San Diego Union-Tribune, Seattle Times*  
International outlets: *CBC News (Canada), Deutsches Ärzteblatt (Germany), The Irish Times, Medical Tribune (Germany), Sciences et Avenir (France)*

### Research Covered in Other Outlets

*American Journal of Managed Care Newsroom, American Prospect, Axios, Becker's Hospital Review, The British Medical Journal, The Business Journals, Business Wire, CFO Magazine, Connecticut Public Radio, Enterprise Echo, FactCheck.org, FierceHealthcare, Forbes, Fortune Magazine, Harvard Business Review, Harvard Gazette, Healthcare Finance News, Healthcare IT News, HealthDay, HealthExec, HealthLeaders Media, The Heritage Foundation, The Hill, The Incidental Economist, Medical Economics, Modern Healthcare, News Wise, People Management, Psychology Today, Retail Wire, ScienceDaily, Tech Times, The Verge, Vice Media, Yahoo News*

## Report of Scholarship

### Peer-Reviewed Scholarship in Print or Other Media:

1. **Song Z**, Reinhardt K, Buzdon M, Liao P. "Association between support group attendance and weight loss after Roux-en-Y gastric bypass." *Surg Obes Relat Dis*. 2008 Mar-Apr;4(2):100-103.
2. Baicker K, Cutler D, **Song Z**. "Workplace wellness programs can generate savings." *Health Affairs*. 2010 Feb;29(2):304-311.
3. **Song Z**, Safran DG, Landon BE, He Y, Ellis RP, Mechanic RE, Day MP, Chernen ME. "Health care spending and quality in year 1 of the Alternative Quality Contract." *New England Journal of Medicine*. 2011 Sep 8;365(10):909-918.
4. Barnett ML, **Song Z**, Landon BE. "Trends in physician referrals in the United States, 1999-2009." *Archives of Internal Medicine*. 2012 Jan 23;172(2):163-170.
5. **Song Z**, Landon BE. "Controlling health care spending—the Massachusetts experiment." *New England Journal of Medicine*. 2012 Apr 26;366(17):1560-1561.

6. McWilliams JM, **Song Z**. "Implications for ACOs of variations in spending growth." New England Journal of Medicine. 2012 May 10;366(19):e29(1-3).
7. **Song Z**, Safran DG, Landon BE, Landrum MB, He Y, Mechanic RE, Day MP, Chernew ME. "The 'Alternative Quality Contract,' based on a global budget, lowered medical spending and improved quality." Health Affairs. 2012 Aug;31(8):1885-1894.
8. **Song Z**, Cutler DM, Chernew ME. "Potential consequences of reforming Medicare into a competitive bidding system." Journal of the American Medical Association. 2012 Aug 1;308(5):459-460.
9. **Song Z**, Landrum MB, Chernew ME. "Competitive bidding in Medicare: who benefits from competition?" American Journal of Managed Care. 2012 Sep;18(9):546-552.
10. **Song Z**, Lee TH. "The era of delivery system reform begins." Journal of the American Medical Association. 2013 Jan 2;309(1):35-36.
11. **Song Z**, Hill C, Bennet J, Vavasis A, Oriol NE. "Mobile clinic in Massachusetts associated with cost savings from lowering blood pressure and emergency department use." Health Affairs. 2013 Jan;32(1):36-44.
12. **Song Z**, Ayanian JZ, Wallace J, He Y, Gibson TB, Chernew ME. "Unintended consequences of eliminating Medicare payments for consultations." JAMA Internal Medicine. 2013 Jan 14;173(1):15-21.
13. Blumenthal DM, **Song Z**, Jena AB, Ferris TG. "Guidance for structuring team-based incentives in healthcare." American Journal of Managed Care. 2013 Feb 1;19(2):e64-70.
14. **Song Z**, Fendrick AM, Safran DG, Landon B, Chernew ME. "Global budgets and technology-intensive medical services." Healthcare. 2013 Jun;1(1-2):15-21.
15. Sharp AL, **Song Z**, Safran DG, Chernew ME, Fendrick AM. "The effect of bundled payment on emergency department use: Alternative Quality Contract effects after year one." Academic Emergency Medicine. 2013 Sep;20(9):961-964.
16. Loehrer AP<sup>^</sup>, **Song Z**, Auchincloss HG, Hutter MM. "Massachusetts health care reform and reduced racial disparities in minimally invasive surgery." JAMA Surgery. 2013 Dec;148(12):1116-1122.
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^ Indicates first authorship by a student, resident, or other trainee.

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^ Indicates first authorship by a student, resident, or other trainee.

### Thesis:

Song Z. "Financial Incentives in Health Care Reform: Evaluating Payment Reform in Accountable Care Organizations and Competitive Bidding in Medicare." Doctoral Thesis. Ph.D. Program in Health Policy, Harvard University, April 2012.

Doctoral Thesis Committee:

Michael E. Chernew, Ph.D. (Chair)

John Z. Ayanian, M.D., M.P.P.

Thomas G. McGuire, Ph.D.

Joseph P. Newhouse, Ph.D.

### Working Papers in Economics:

"Pricing and Pass-through in Response to Subsidies and Competition: Evidence from Medicare Advantage Before and After the Affordable Care Act" (with Daria Pelech)

Abstract: After years of growth before the Affordable Care Act (ACA), federal payments to Medicare Advantage plans began to decline after the ACA. We exploit variation in these payments to assess how private plans respond to increases and decreases in these federal subsidies before and after the ACA, notably whether their response is symmetric. We find that private plans changed their pricing and pass-through to beneficiaries symmetrically, with plans passing through roughly 60 cents for each dollar of payment increases or decreases. However, during the period of payment reductions (post-ACA), plans reduced less salient benefits by more than they had increased them during the period of payment increases (pre-ACA), even though plans left premiums virtually unchanged. Partial pass-through suggests that plans operate above cost; plans in more competitive markets responded less to payment changes than plans in less competitive markets. Partial pass-through of payment cuts, combined with

quality bonuses and growth in risk scores, may explain the continued growth in Medicare Advantage enrollment post-ACA.

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