

1. Which of the following services do you provide?

+ Organizational Readiness

As PACE organizations look to increase participation in new and existing service areas, HMA can assist organizations with market feasibility studies, financial proformas, and the development of state and federal PACE program applications. Backed by a powerful combination of multidisciplinary clinical and technical experts, HMA is structured to expedite the strategic planning process, stand up new PACE organizations, and identify and solve current operational limitations.

- Understanding the PACE market includes understanding the political landscape in the city, state and desired area of service. HMA's expert analysis includes understanding:
 - States and counties favorable to PACE development
 - Legislative funding and/or slot limits exist
 - What competition, real or perceived, is present in your desired service area
 - What unknown factors including political, Medicaid, or others exist
 - Whether the state of interest has PACE authorized within the Medicaid State Plan
- By understanding the market, HMA will assist organizations to identify PACE service areas by:
 - Conducting the PACE feasibility study
 - Identifying the number of potential PACE-eligible participants residing in the desired service area
 - Calculating a five-year enrollment projection
 - Identifying a breakeven enrollment point
 - Budgeting the projected operating revenue
- Programs should also understand state licensure issues and restrictions including:
 - Any State licensure requirements
 - Profit vs. non-profit PACE organization structure
 - Availability of waivers for state licensure
 - Separate state health insurance licensure requirements
- The application process to become a PACE organization can be daunting and includes:
 - Navigating and working with state Medicaid agencies
 - Navigating and working with Centers for Medicare & Medicaid Services (CMS)
 - Completing and submitting the Notification of Intent to Apply (NOIA)
 - Securing state and federal approval
 - Completing the readiness review
 - Guidance for developing required marketing materials

+ Operations

Achieving performance targets requires advanced systems of care delivery and agile information technology tools for real-time monitoring and management of populations and participants. Effective operating and reporting systems are critical to the success of PACE organizations' operations. HMA has evaluated system requirements for PACE and can help you identify, select and implement operating systems. To optimize operations efficiency, we also offer solutions for tracking and managing revenue, participant care costs, productivity, and downstream payments. We can also work to implement telehealth and remote patient monitoring technologies.

+ Network Contracting Evaluation

Contracting with specialty and ancillary healthcare providers along the continuum of care will be increasingly critical for managing participant care, outcomes and costs under the PACE model. We can assess the scope and effectiveness of current contractual relationships, including reimbursement, reporting requirements and other elements critical to compliance and operational success, across a wide range of healthcare and social service providers.

+ Policy

HMA has extensive policy experience with the legislative requirements that govern PACE at both the state and federal level. We can help evaluate the impact of new requirements or legislation to inform your position with regulators.

2. What year did your organization begin providing technical assistance for PACE?

2002

3. List key employees and describe their experience with PACE (including number of years).



Pat Casanova, BSN RN, Principal

Pat Casanova has been assisting PACE Organizations since 2011 with all aspects of PACE development and implementation. She supports the relationship between the client, state Medicaid officials and CMS and helps complete the marketing analysis, PACE program development strategy, and PACE application. Ms. Casanova also helped Indiana's first PACE program double their service area in 2018.

Prior to her work at HMA, Ms. Casanova approved the first PACE program in Indiana in her capacity as Indiana's Medicaid Director. She worked closely with the hospital system applicant to help them understand PACE program roles and responsibilities, develop the PACE application, and lead the State's PACE rate setting and State Plan Amendment process with CMS.



Margaret Tater, JD, Managing Principal

Margaret Tater has provided PACE technical assistance, including regulatory guidance and market feasibility analysis to organizations interested in developing or expanding PACE programs since joining HMA in 2014. Her efforts have included advising a large nationally-focused PACE organization regarding growth and expansion, assisting a California-based PACE organization regarding state regulatory changes to promote expansion of the PACE model in county organized health

systems, and providing start up guidance and technical assistance to a large health system interested in starting a PACE program.

Prior to joining HMA, Ms. Tater lead the regulatory efforts for a California MCO's PACE start-up and as a member of the executive team, oversaw work in connection with site selection, hiring, and staffing. In addition, while working for the California Department of Health Care Services as Medi-Cal (Medicaid)

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Acting Deputy Director, she oversaw four divisions, including the Long-Term Care Division responsible for oversight of California's PACE programs.



Don Novo, BA, Principal

Don Novo is a health policy professional whose career spans over 20 years within Medicaid program administration. He has served in leadership positions at both the state and federal levels, and his work includes both direct state Medicaid program administration and federal regulatory oversight. For the past five years, Mr. Novo has assisted PACE Organizations with Market Assessment, PACE application development, and state licensure and waivers, program implementation, including conversion of a non-profit PACE Organization to a for-profit PACE Organization. His work includes consulting with the National PACE Association on PACE payment rates.

Mr. Novo came to HMA from the Centers for Medicare & Medicaid Services (CMS) where he worked on health reform implementation projects and Medicaid program management oversight of the state Medicaid programs in Arizona, California, Hawaii, Nevada, and the Pacific Territories.

Mr. Novo earned his bachelor's degree from the University of Bridgeport.



Susan Tucker, CPA, Principal

Susan Tucker possesses extensive long-term services and supports (LTSS) operational, compliance and financial expertise for programs at the local, state and national level, including more than five years providing PACE technical assistance with HMA. Prior to joining HMA, she served in vice president roles related to strategy, long-term services and supports and Medicare-Medicaid dual integration programs, and she served as interim and deputy secretary for the Florida Department of Elder Affairs, as well as director of fiscal and contract management. She earned a bachelor's degree in accounting from the University of South Florida and is a Certified Public Accountant licensed in the state of Florida.



Michael Engelhard, MBA, Managing Principal

Michael Engelhard provides PACE start-up strategy and application support with a specialization in the areas of rate analysis and pro-forma development. He has helped support multiple PACE clients throughout the development, application, and implementation phases of their PACE program and recently presented to Florida's PACE programs on Florida's Medicaid PACE capitation rate challenges and solutions. Prior to joining HMA in 2014, Mr. Engelhard was the Chief Financial Officer of a managed care plan and a member of the executive team that expanded their program offerings for older adults, implementing PACE in 2013. Today, this PACE program offers services at their PACE Center and through partnerships with adult day services providers in four additional locations.

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Ellen Breslin, MPP, Principal

Ellen Breslin has worked as a health policy analyst and in leadership positions for the state and federal governments for nearly three decades and has been providing PACE technical assistance for over 15 years. She assists PACE organizations and associations in writing issue briefs, providing payment expertise, and strategic planning.

Ms. Breslin was a former principal analyst with the Congressional Budget Office (CBO), and the former director of the managed care reimbursement and analysis for MassHealth, the Massachusetts Medicaid program. She has expertise in all areas of payment policy, including capitation rate setting and the 3 Rs. Ms. Breslin earned her master's degree in public policy from Duke University.



Richard Chambers, Principal

Richard Chambers is an experienced healthcare executive with vast expertise in PACE, Medicaid, Medicare Advantage, and Marketplace managed care. Richard has provided two years of PACE technical assistance with HMA. Previously, Richard was the CEO at CalOptima and led the development of the first PACE program in Orange County, CA. Richard also served in a number of roles during his more than two decades with the Centers for Medicare & Medicaid Services (CMS). Throughout his

career Richard has provided guidance for a number of commissions and committees, including being one of the inaugural appointees to the Medicaid and CHIP Payment and Access Commission (MACPAC), the CBO Office Health Advisers Panel, the California Insure the Uninsured Project, and the California Association of Health Plans. Richard received his bachelor's degree in psychology from the University of Virginia.



Dana McHugh, BS, Principal

Since coming to HMA in 2017, Dana McHugh assists PACE clients with provider relations issues. She supported a PACE organization to review and recontract their provider network to improve contract language, rates, and application processes. Ms. McHugh reviews and suggests PACE provider reimbursement rates and provides an overall approach and process to complete contracting. She also reviews provider

relations strategies and provides recommended approaches as well as tools and worksheets to incorporate PACE requirements into provider education programs. Prior to joining HMA, Ms. McHugh coordinated and helped lead PACE informational and education sessions for senior services providers in her capacity as executive director of the Florida Association of Homes for the Aging, Health & Services Corporation (FAHA H&S), a subsidiary of Leading Age Florida.



Eileen Moscaritolo, BS, Principal

Joining HMA in 2019, Eileen Moscaritolo brings PACE-specific expertise in healthcare technology, including electronic medical records systems, encounters and health information technology as well as medical records management. In addition to PACE, she has extensive experience in managed care systems and operations. Prior to joining HMA, she worked for California-based PACE organization. Eileen earned a Bachelor of Science degree from Boston University

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and began her career as a programmer, program analyst, project manager and information services director.



Debby McNamara, MSW, LCSW, PMP, Senior Consultant

A licensed clinical social worker and a certified project management professional, Debby McNamara came to HMA from the Florida Medicaid program. She has been providing PACE technical assistance since coming to HMA in 2012. Her work includes market assessment, PACE applications, and policy and regulatory support to PACE Organizations/associations. Her additional areas of expertise include Medicaid policy, clinical behavioral healthcare, managed care, and correctional healthcare. Ms. McNamara received her master's degree in social work and bachelor's degree in psychology and information studies from Florida State University.



Tracy Tang, MA, Senior Consultant

Tracy Tang provides healthcare consulting services to public and private clients, specializing in Medicaid financed healthcare programs. She supports PACE Organizations through development of policies and procedures and the financial proforma, which she has been doing for two years. Prior to joining HMA in 2002, she worked as an analyst for the State of Florida, Agency for Health Care Administration's Medicaid Program and as a statistician for the Florida Center for Health Information and Policy Analysis. Ms. Tang received her master's degree in executive management from Florida State University.



Anissa Lambertino, MPH, PhD, Senior Consultant

Anissa Lambertino has more than 15 years of experience in public health research, and she has been conducting the data analysis and mapping component of the PACE Market Assessment for three years. At HMA, Anissa has served as the data and GIS analyst for projects focused on demographic projections, PACE eligible estimation, and PACE Medicaid capitation rates and trends among populations 65 years and over. Anissa is particularly skilled at utilizing sophisticated statistical and geo-mapping software to make Medicaid claims and survey data understandable, approachable and actionable for the end user.

Dr. Lambertino received her doctorate in epidemiology with a specialization in occupational and environmental epidemiology from the University of Illinois at Chicago. She received her master's degree in public health in epidemiology from the University of Illinois at Chicago and her bachelor's degree in health science and sociology from Benedictine University.

4. How many PACE clients are you currently serving? **12**
5. How many PACE clients have you served since your TAC was created? **26**
6. How many PACE feasibility studies have you conducted? **12**

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7. How many PACE applications have you submitted? **6**
8. How many organizations have you moved through the process from market feasibility to ongoing operations? **3**
9. List the states you've worked with and briefly describe your effectiveness in working with those states on rate setting.

States in which HMA has consulted on rate setting:

Florida – HMA provided technical assistance to the Florida PACE Providers Association when working with the state and its actuary to transition to a cost-based rate setting approach, resulting in significant increases in the Medicaid rate for each PACE Organization. HMA continues to consult on rate-related issues, currently in discussions with the Association and the state on potential adjustments to the methodology.

Massachusetts – HMA provided technical assistance to the MassPACE Association to provide review of the state's methodology for setting capitation rates and developed recommendations to improve this methodology.

California – HMA provided consultation to PACE Organizations to support them in negotiating with the state on rate methodology.

Kentucky – HMA is currently supporting a client as they work with the state on development of the initial PACE rate methodology.

Other states where HMA has done PACE work (which may include market and feasibility studies, PACE applications and implementation, policy and regulatory support, association support, contracting assistance, due diligence, etc.):

California	New Hampshire
Colorado	New Jersey
Indiana	New Mexico
Iowa	Pennsylvania
Michigan	Texas
Nebraska	Virginia

10. List the names of the PACE organizations you utilize as resources. Identify those that are used for site visits.

HMA has maintained multiple on-going client relationships with PACE organizations, all of whom are gracious in assisting potential PACE organizations through telephone calls or site visits. We connect

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potential PACE organizations to PACE clients who are most appropriate for their individual needs and questions. Many of those such clients are listed as references below.

11. Provide a list of previous and current clients (including contact information) that we may contact to ask them to complete a satisfaction survey.

PACE at Cambridge Health Alliance

Jed Geyerhahn, Executive Director

Phone: (617) 575-5850

Email: jgeyerhahn@challiance.org

Florida PACE Providers Association

Matt Hudson, Executive Director

Phone: 239-560-3814

Email: matt.hudson@flpace.org

Franciscan Senior Health & Wellness

Peggy Homeier, Director of Operations

Phone: (317) 782-8012

Email: Peggy.Homeier@franciscanalliance.org

Innovative Integrated Health

Abe Marouf, CEO

Phone: (949) 228-5577

Email: amarouf@innovativeih.com

Hope PACE

Samira Beckwith, President and CEO

Phone: (239) 489-9140

Email: Samira.Beckwith@hopehcs.org

MassPACE Association

Candace Kuebel, Executive Director

Phone: 978-580-1679

Email: ckuebel@masspace.net

Palm Beach PACE

Dr. Alan Sadowsky, Senior VP MorseLife

Phone: (561) 687-5745

Email: ASadowsky@MorseLife.org

Suncoast PACE

Jennifer Kaminsky, Vice President - Home Health and Elder Services

Phone: 727.324.1840

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Email: JenniferKaminsky@EmpathHealth.org

12. Provide a list of previous and current clients (including contact information) that have agreed to serve as references.

PACE at Cambridge Health Alliance

Jed Geyerhahn, Executive Director

Phone: (617) 575-5850

Email: jgeyerhahn@challiance.org

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