

## **Plenary Presenters**

### **Opening Plenary Session**

#### **Linda Briggs, MSN, MA, RN**

With 25 years of nursing experience as a critical care staff nurse, nurse manager, clinical nurse specialist, and educator, Linda Briggs joined Respecting Choices in 1999 to provide leadership in the development and dissemination of this internationally recognized program. She has been privileged to consult with healthcare leaders, organizations, and communities around the world providing education and support in implementing the principles of effective and sustainable person-centered decision-making programs. Her clinical and research interests have focused on the disease-specific planning needs of patients with advanced illness and their families.

Briggs has led the development of the Respecting Choices curriculum, co-authored several Respecting Choices manuals and programs, and has published numerous articles regarding advance care planning and end-of-life care. In 2015, Briggs received recognition from the Tribeca Disruptive Innovation Awards for the impact of the Respecting Choices program. In 2017, Briggs transitioned to the role of Director of Program Development and Research as Respecting Choices became a division of C-TAC Innovations

#### **Amy Berman, RN, LHD, FAAN**

Amy Berman is a Senior Program Officer with The John A. Hartford Foundation. She leads the Foundation's development and dissemination of innovative, cost-effective models of care that improve health outcomes for older adults. Among these efforts, Dr. Berman is responsible for the Foundation's work to advance palliative care led by Diane Meier and the Center to Advance Palliative Care, and other national efforts focused on serious illness and end-of-life care including Vital Talk, the Serious Illness Project, National POLST, The Conversation Project, Respecting Choices, the Coalition to Transform Advanced Care (C-TAC) and the National Consensus Project Guidelines for Palliative Care. She has also directed collaborations with federal partners including the Centers for Medicare and Medicaid Innovation, the Office of the National Coordinator for Health Information Technology, and the Administration for Community Living.

Dr. Berman openly shares her experiences living with Stage IV breast cancer. She has presented to the Institute on Medicine and has authored numerous pieces about her health care choices, palliative care and implications for patients, practice and policy. Her piece in *Health Affairs*, "Living Life In My Own Way—And Dying That Way As Well," was among the journal's most read in 2012. She has been featured in *The New York Times*, *Washington Post*, *Forbes*, and on *NPR's Diane Rehm Show*. She blogs on the Hartford Foundation's HealthAGenda site ([www.johnahartford.org/blog](http://www.johnahartford.org/blog)) and can be followed on Twitter as @johnahartford and @notesonnursing.

Prior to the Foundation, Dr. Berman served as Nursing Education Initiatives Director for the Hartford Institute for Geriatric Nursing at New York University College of Nursing. Among her responsibilities at New York University, Dr. Berman developed resources and programs to improve the geriatric expertise of nursing educators and clinicians. She conducted a national survey on gerontological nursing content in baccalaureate programs cited in the Institute on Medicine's report, "Retooling for an Aging America: Building the Health Care Workforce."

Before joining New York University, Dr. Berman worked in home health care administration for twenty years with responsibility for quality improvement, health information technology, accreditation, and regulatory compliance. She served as JCAHO coordinator and as accreditation consultant in performance improvement for a variety of health care institutions. Dr. Berman served on the New York State Department of Health's Emergency Preparedness Task Force and on the professional advisory boards of health care institutions in New York City.

Dr. Berman is an appointed member of CMS' Patient and Family Engagement Network, served on the Aging Task Force for Healthy People 2020, and serves on a number of federal Technical Expert Panels.

Dr. Berman has been the recipient of numerous honors for her advocacy on behalf of older adults and those facing serious illness. She received the Presidential Award from the National Coalition for Cancer Survivorship, the President's Award from the National League for Nursing for reshaping nursing education, and the Civitas Award from the American Academy of Nursing for her policy and advocacy efforts. The international honor society of nursing, Sigma Theta Tau, established the Amy J. Berman Geriatric Nurse Leadership Award in 2012, which is awarded at their biennial meeting. Berman was also recognized for her leadership in the field of philanthropy by Grantmakers in Health with the Terrance Keenan Award. She was conferred a Doctorate of Humane Letters for Quinnipiac University, a Bachelor of Science degree in nursing from New York University College of Nursing, a Bachelor of Science degree in health care administration from the University of Massachusetts, Amherst, and a Geriatric Scholar Certificate from the Consortium of New York Geriatric Education Centers.

### **Cathy Wurzer**

Cathy Wurzer is an author, documentary filmmaker, and host of Morning Edition for Minnesota Public Radio News. She is also a four-time Emmy Award winner for her work as the co-host of Almanac, a weekly public affairs program produced by Twin Cities Public Television for Minnesota's statewide public television network. Additionally, Wurzer is a leadership team member and co-founder of The Convenings, a multi-layer community engagement program to help Minnesotans talk about the often-taboo subject of late-life planning and living as meaningfully and fully as possible in spite of disease and disability at the end of life. It has involved an unprecedented collaboration among Minnesota civic leaders, health care, faith, and commercial and public media professionals. The Convenings was honored with the 2017 Board of Governors Emmy® Award from the National Academy of Arts & Sciences Upper Midwest Chapter.

### **Plenary Session 1**

#### **Bud Hammes, PhD**

Dr. Bernard Hammes is the Executive Director of Respecting Choices, a Division of C-TAC Innovations. In this position, Dr. Hammes provides overall leadership for the delivery of Respecting Choices services, training, and materials to healthcare organizations to develop and improve person-centered care especially when individuals develop serious or advanced illnesses. C-TAC Innovations is a not-for-profit organization, headquartered in Washington, DC, whose mission is to improve the care of persons with advanced and serious illness through education and training. Respecting Choices operates out of La Crosse, Wisconsin.

Dr. Hammes' work has been primarily focused on improving care for patients with serious illness. This work has resulted in the nationally recognized program on advance care planning: Respecting Choices.

He served as editor for the book *“Having Your Own Say: Getting the Right Care When It Matters Most,”* which was released in 2012. He has authored or co-authored 46 articles and book chapters that are focused on clinical ethics, advance care planning, and care of patients with serious illness. Dr. Hammes is a past member of the executive committee of the National POLST Paradigm Task Force and previously served as the first chair of the Task Force. He is a past member of the board of directors for the Coalition to Transform Advanced Care (C-TAC) and is acting president of the International Society of Advance Care Planning. Dr. Hammes was awarded the PDIA Palliative Medicine Community Leadership Award by the American Academy of Hospice and Palliative Medicine in 2012. This award recognizes an individual for contributions to the advancement of the field of palliative medicine through the education and training of future leaders. He received recognition from the Tribeca Disruption Innovation Awards for the impact of the Respecting Choices program in 2015. This award celebrates those whose ideas have broken the mold to create remarkable impact.

For 32 years, Dr. Hammes was a member of the medical staff and Director of Humanities and Respecting Choices at Gundersen Health System. In this role, he provided education to house staff, medical students, and all employees at Gundersen. He chaired the Institutional Review Board and the Ethics Committee as well as provided ethics consults. His work at Gundersen brought together system redesign, quality improvement, community engagement, and health professional education to improve the outcomes of patient care. He has been a professor of Clinical Science at the University of Wisconsin-La Crosse, an associate adjunct professor of the Institute for Health and Society at the Medical College of Wisconsin, and a clinical assistant professor in the Department of Pediatrics at the University of Wisconsin School of Medicine and Public Health. Dr. Hammes was educated at the University of Notre Dame, receiving his Bachelor of Arts in 1972 and his Doctorate in Philosophy in 1978. He has taught at the University of Gonzaga in Spokane, Wash., and at the University of Wisconsin-La Crosse.

### **Stephanie Anderson, DNP, RN**

Dr. Stephanie Anderson is the deputy executive director of Respecting Choices, a division of C-TAC Innovations. She is responsible for designing and leading operations including the delivery of this internationally recognized program. She has over 25 years of experience in hospice and palliative care, home care, case management, and emergency medicine. Dr. Anderson earned her doctor of nursing practice degree from the University of Iowa specializing in health systems administration.

Dr. Anderson has served in a variety of leadership roles. In these roles, her palliative care program was awarded Joint Commission Certification and the system received the Circle of Life award from the American Hospital Association. She led the initiation of and co-chaired the Iowa Physician Orders for Scope of Treatment (IPOST) movement, resulting in new legislation and statewide implementation. Dr. Anderson joined Respecting Choices in 2013 as a senior faculty consultant and evolved into the director of consultation and education services prior to her current role.

Dr. Anderson currently chairs the National POLST central region leaders group and is a member of the POLST developing states committee. She has most recently been named vice president of the International Society of Advance Care Planning and End of Life Care (ACPEL).

Dr. Anderson believes person-centered decision making based on an individual’s goals and values truly transforms care and should be the top priority to delivering exceptional whole-person healthcare.

## **Jon Broyles**

As Executive Director, Coalition to Transform Advanced Care (C-TAC), Jon oversees day-to-day operations and sets strategy for C-TAC. Early in his career he met Reverend Diane Smalley, a powerful advocate living with advanced illness, who told him to keep it simple: focus on opening doors. In acting on Diane's legacy Jon has the benefit of drawing on hundreds of innovators' experience and talent in the Coalition. His role is channeling these resources into practical approaches to improve care for those living with advanced illness.

## **Tom Koutsoumpas**

Tom Koutsoumpas has long been recognized as one of the nation's leading experts and advocates in health care policy. He is also a recognized leader in issues related to Medicare, elder care, advanced illness and hospice care. With a career that spans from the U.S. Senate and the Indiana Governor's Office to leading the development of the nation's largest health care companies' Washington presence, Tom has worked to ensure that private and public health care programs and organizations are prepared to meet the ongoing opportunities and challenges related to health system transformation. Tom has primarily focused on high-quality patient care delivery.

Tom co-founded and currently co-chairs the Coalition to Transform Advanced Care (C-TAC). In addition, Tom currently serves as President and CEO of the National Partnership for Hospice Innovation and a Principal at Healthspieren, a Washington-based policy and legal services organization. Previously, he served as Senior Vice President and Founding Executive Director of the Mintz Levin Center for Health Law & Policy, a part of the Mintz Levin law firm. Before joining Mintz Levin, Tom served as Corporate Vice President of UnitedHealth Group, one of the nation's largest healthcare companies. Tom joined United as Senior Vice President at Ovations, United's then-Medicare division. At Ovations Tom developed and oversaw federal and state government relations during implementation of Part D and the expansion of the Medicare Advantage program. Tom is a member of the Roundtable on Quality Care for People with Serious Illness in the Health and Medicine Division of the National Academy of Sciences, Engineering, and Medicine, which convenes experts in the in quality care for those with serious illnesses. Tom also serves as one of the leaders of the Project on Advanced Care at Petrie-Flom Center at Harvard Law School. Tom is also the current Chairman of the Board of Directors of Capital Caring and the Immediate Past Chairman of the Board of Directors of The National Coalition for Cancer Survivorship. In addition, Tom served as a member of the Advisory Council of the National Center for Medical-Legal Partnership and he previously served on the Board of Directors of the National Hospice and Palliative Care Organization and on the Board of Trustees of the National Hospice Foundation. He has also been a member of the Business-Government Relations Council in Washington DC.

Prior to his work with UnitedHealth Group, Tom was Executive Vice President and Chief of Public Affairs at VITAS Healthcare Corporation. Tom's work experience prior to VITAS included serving as Senior Advisor and Executive Assistant to former Indiana Governor (and later Senator) Evan Bayh. Tom also worked as a health policy advisor with the Health Practice Group of the Hogan Lovells law firm (formerly Hogan and Hartson law firm), where he was instrumental in creating and implementing the Medicare Hospice Benefit. He began his career working in the United States Senate and also served as an associate in public affairs for Burson Marsteller.

Tom is a co-author of the books *A Roadmap to Success: Transforming Advanced Illness Care in America* and *Having Your Own Say: Getting the Right Care When It Matters Most* by Gundersen Health System.

Tom is a graduate of Georgetown University in Washington, DC where he served on the Georgetown University Board of Regents.

### **Jeff Thompson, MD**

Jeff Thompson, MD, is executive advisor and chief executive officer emeritus at Gundersen Health System, pediatrician, author, and speaker on values-based leadership. Jeff's experience in leadership is far-reaching, having led diverse teams, projects, and divisions, before holding multiple senior executive roles, including fourteen years as a CEO responsible for a staff of seven thousand, hundreds of thousands of patients, and a billion dollars of the community's money within the Gundersen Health System. His long experience as intensive care pediatrician and senior executive has shown him over and over again how leading from one's values has the power to affect long-term meaningful change.

During Dr. Thompson's tenure, Gundersen Health System has been recognized across the country by independent healthcare ratings organizations for high-quality patient care. It has also earned the highest honors of Healthgrades America's 50 Best Award™ for 2012 through 2016 and the White House Champions of Change award in 2013. Dr. Thompson is a founding member and past board chair of the Wisconsin Collaborative for Healthcare Quality and the La Crosse Medical Health Science Consortium. He also serves on boards for the ThedaCare Center for Healthcare Value, the Wisconsin Statewide Value Committee, About Health (chair), and Practice Greenhealth.

Dr. Thompson has authored and been featured in many articles, book chapters and abstracts on healthcare, leadership and sustainability topics. He is the author of *Lead True: Live Your Values, Build Your People, Inspire Your Community*, (Forbes Books, March 2017).

Dr. Thompson is board certified in Pediatric Critical Care, Neonatal and Perinatal Medicine, and Pediatrics. He has been caring for patients for over thirty-five years. He earned his medical degree from the University of Wisconsin School of Medicine and completed his residency and fellowship at SUNY Upstate Medical University. He resides in La Crosse, Wisconsin with his wife and in near proximity to his three grown children.

### **Plenary Session 2**

#### **Amy Vandenbroucke, JD**

Amy Vandenbroucke, JD, is the Executive Director of the National POLST Paradigm. She is passionate about patient autonomy, medical ethics, and (of course) the POLST Paradigm. In her spare time, she teaches on those topics as Assistant Professor at Oregon Health & Science University, trains her dog for agility courses, paddle boards, is a foodie with her husband, and runs a cocktail club in Portland, Oregon. She was a 2015 Practice Change Leader for Aging and Health, a yearlong program jointly supported by the Atlantic Philanthropies and the John A. Hartford Foundation, and a Hartford Change AGent through the Hartford Change AGents Initiative.

### **Plenary Session 3**

#### **Jessica B. Martinson, MS**

Jessica Martinson is the Director of Clinical Education and Professional Development at the Washington State Medical Association. Jessica leads the WSMA Foundation for Health Care Improvement's two key initiatives: Honoring Choices Pacific Northwest and Choosing Wisely. Jessica was instrumental in the

design and launch of Honoring Choices Pacific Northwest, an initiative to improve end of life care in the region. Jessica is an Honoring Choices Pacific Northwest Faculty member and leads the implementation efforts. This unprecedented statewide initiative is jointly sponsored with the Washington State Hospital Association and is in partnership with 26 (and growing) health care organizations in the state. The initiative includes programs that support advance care planning conversations, physician professional development, community engagement, advocacy and the launch of a state repository for advance directives and POLST.

Under her leadership, the WSMA Foundation has been awarded grants from the ABIM Foundation in partnership with the Robert Wood Johnson Foundation to support the Choosing Wisely campaign. Washington state is nationally recognized as a leader in transitioning the campaign from education to implementation. Jessica was the lead author on the *Choosing Wisely Action Manual*, which supports physicians who seek to reduce unnecessary tests, procedures and treatments. She co-leads the Washington State Choosing Wisely Task Force, which provides physician leadership on implementation, measurement development and monitoring outcomes. In addition, Jessica oversees the WSMA's CME Department and heads-up the Leadership Development Conference, Clinical Performance Improvement Network and Medical Officer Collaborative. She also collaborates with other quality improvement organizations to improve patient safety, health equity and care transitions.

Jessica has a Bachelor of Science from Drake University and a Master of Science from Central Washington University.

#### **Plenary Session 4**

##### **Rebecca Sudore, MD**

Dr. Rebecca Sudore is a geriatrician, palliative medicine physician, and clinician investigator. She also directs the Innovation Center for Action-oriented REsearch (I-CARE) in Aging & Palliative Care and the Vulnerable Populations for Aging Research Core of the NIA-funded Pepper Center. Dr. Sudore conducts research to improve advance care planning and medical decision making for diverse, vulnerable older adults. To this end, she has designed, tested and disseminated innovative, patient centered tools including easy-to-read advance directive in over 10 languages (<http://www.iha4health.org/our-services/advance-directive/>) and an interactive, advance care planning website called PREPARE ([www.prepareforyourcare.org](http://www.prepareforyourcare.org)).

#### **Plenary Session 5**

##### **Maureen E. Lyon, PhD**

Maureen E. Lyon, PhD, FABPP is a licensed Clinical Health Psychologist and Professor of Pediatrics at George Washington University School of Medicine and Health Sciences within the Center for Translational Science of Children's Research Institute and the Division of Adolescent and Young Adult Medicine at Children's National Medical Center. Dr. Lyon's research and interests focus on the study of adolescence, specifically supporting children and adolescents with serious medical conditions, including cancer and HIV/AIDS through advance care planning with their families. Dr. Lyon has also conducted research on advance care planning with adults living with HIV/AIDS. Dr. Lyon is especially interested in how religious and spiritual beliefs, values and coping influence adolescents' well-being. Other areas of interest include family caregivers of children with rare diseases and how yoga and meditation can help

with chronic illness self-management. Before becoming a psychologist Dr. Lyon was a junior high school teacher and Hospice volunteer.

### **Jon Sande, MD**

Jonathan (Jon) Sande, a physician in Hematology/Oncology, is the Director of the St. Mary's Medical Center Ethics Program, and Director of Advance Care Planning at Essentia Health, a non-profit integrated health care system spanning northwest Wisconsin, Minnesota, the eastern Dakotas, and reaching into Idaho. His primary responsibility is to develop comprehensive advance care planning for the patients and communities served by Essentia Health. He is board certified in internal medicine, hematology, and oncology, and continues an active outpatient and inpatient practice.

Sande is a First Steps<sup>®</sup>, Next Steps<sup>®</sup>, and Last Steps<sup>®</sup> facilitator; an instructor for Next Steps<sup>®</sup> and Last Steps<sup>®</sup>; Organization Faculty for Next Steps<sup>®</sup>; and served on the Curriculum Advisory Committee for the development of the Respecting Choices<sup>®</sup> Shared Decision Making in Serious Illness curriculum. He believes that advance care planning and shared decision making—accurate, interdisciplinary, coordinated, and accessible in real time across all care continuums—is the most important way to ensure person centered care, and key to transforming health care in the United States and abroad.

Sande is a graduate of St. Olaf College, and completed medical school, residency, and fellowship training at the Mayo College of Medicine. A former fellow in the Pew Program in Medicine, Arts, and the Social Sciences at the University of Chicago, he is currently a doctoral candidate in ethics at the University of Chicago Divinity School. He was named 2016 Physician of the Year by his colleagues at Essentia Health for his dedication to person centered care and improving end of life care for patients and families. He and his wife Karen have been married for over 30 years. They have three wonderful adult children, and enjoy wandering the wilderness areas in and around Duluth, Minnesota with Winston, their black lab-huskie mix.

### **Kate Detwiler**

Kate Detwiler is a mom and advocate for children with medical complexity and pediatric palliative and hospice care. Two years ago Kate and her husband, Brian, adopted a medically complex child named Nolan. Nolan has a rare disease called short bowel syndrome and is dependent on total parenteral nutrition and gastrostomy tube feeds. Nolan is a thriving 2 year-old little boy with blue eyes and strawberry blond hair who loves his family, dog, playgrounds, and trains. He is currently very interested in learning his numbers and letters, playing with trucks, coloring, and puzzles.

Currently Kate works part-time at Children's National in Washington, DC building a primary care medical home for children with medical complexity. Before Nolan was born, she was a member of the pediatric palliative care program and a hospitalist consultative program for medically fragile children.

### **Linda Briggs, MSN, MA, RN**

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## **Plenary Session 6**

### **Julie Wallace**

Julie Wallace comes to this conference from Grand Rapids, Michigan where she is an ardent volunteer in the area of Patient Advocacy. She spent 9 years as a member of Spectrum Health's Executive Patient & Family Advisory Council serving two terms as Chair of the Council. She also sits on Spectrum's Ethics Committee where she has represented the community for 8 years. In addition, Julie has been a steering committee member for both Making Choices Michigan (a West Michigan community ACP organization) and Spectrum Health's Advance Care Planning initiative. Julie sought this calling after walking with her two sisters through their simultaneous breast cancer diagnosis and treatment, an experience that compelled her to become involved with her healthcare community and to support the advancement of true patient-centered care.

Professionally, Julie is semi-retired from a 35-year career as an award-winning film and video producer and corporate communications professional. She started her career as a news producer for WOTV the NBC affiliate in Grand Rapids, moved on to become a corporate producer for Steelcase Inc., a world leader in office furniture manufacturing, and eventually started her own production company, Dog and Pony Communications, serving the West Michigan area since 1994. She is a graduate of Northwestern University in Evanston, Illinois.

## **Plenary Session 7**

### **Laura Pennington**

Laura Pennington is currently the Practice Transformation Manager within the Clinical Quality and Care Transformation division at the Washington State Health Care Authority. As part of the Healthier Washington initiative, she leads the Shared Decision Making Program, working closely with the Chief Medical Officer and national experts to develop and implement a process to certify patient decision aids in Washington, including spreading the use of shared decision making as a practice throughout the state. Her background is in public health and clinical quality performance measurement, where she has worked with communities over 17 years to implement policy and environmental changes to influence healthy outcomes.

## **Closing Plenary Session**

### **Jean R. Slutsky, PA, MSPH**

Jean R. Slutsky is the Chief Engagement and Dissemination Officer at the Patient-Centered Outcomes Research Institute (PCORI). She leads PCORI's Engagement Program and growing dissemination and implementation planning efforts.



Before joining PCORI, Slutsky directed the Center for Outcomes and Evidence at the Agency for Healthcare Research and Quality, where she conceived and implemented the Effective Health Care program. The Effective Health Care program is an integrated program of research, stakeholder engagement, research training, and dissemination and implementation of comparative effectiveness research. Slutsky is particularly interested in pragmatic user-driven research and its implementation into healthcare decision making.

Slutsky received her baccalaureate degree from the University of Iowa, trained as a Physician Assistant at the University of Southern California, and received a MSPH in health policy from the University of North Carolina at Chapel Hill.