

**CATHY SCHOEN  
CURRICULUM VITAE**

Cathy Schoen  
519 Montague Road  
Amherst, MA 01002

Phone: 917-533-2318  
Fax: 413-549-7521  
E-mail: [cathyschoen70@gmail.com](mailto:cathyschoen70@gmail.com)

**PROFESSIONAL EXPERIENCE**

July 2016 (Current): Health Policy Analysis Consultant and Senior Scholar in Residence, New York Academy of Medicine

September 2014 to 2016: Executive Director Commonwealth Fund Cost Control Initiative and Visiting Fellow, NYU Robert F. Wagner School of Public Service

2005 to July 2014: Senior Vice President for Policy, Research and Evaluation. Commonwealth Fund, New York, NY

- 2005-2013: Research Director of the Commonwealth Fund Commission on a High Performance Health System. (Commission Ended March 2013)

1995 to 2005: Vice President Policy and Research, and Executive Director of the Fund Task Force of the Future of Health Insurance, Commonwealth Fund, New York, NY.

1993 to 1995: Research Associate Professor, School of Public Health and Health Sciences, University of Massachusetts, Amherst, MA.

1990 to 1993: Special Projects Director and Research Faculty, Labor Relations and Resource Center, University of Massachusetts, Amherst, MA.

1987 to 1993: Health Finance, Benefits, and Policy Consultant.

Summer/Fall 1988: Senior Health Policy Advisor, Dukakis Presidential Campaign.

1983 to 1985: Visiting Associate Professor, Health Economics, School of Public Health and Health Sciences, University of Massachusetts, Amherst, MA.

1979 to 1987: Research and Policy Director and Special Assistant to the President, Service Employees International Union, Washington, DC.

1977 to 1979: Health Economist National Health Insurance Task Force and Director of Medicaid and Ambulatory Care Reimbursement Project, Office of the Deputy Assistant Secretary for Planning and Evaluation/Health, U.S. Department of Health, Education and Welfare, Washington, DC.

1976 to 1977: Research Associate, Brookings Institution, Washington, DC.

1975 to 1976: Research Fellow, Brookings Institution, Washington, DC.

1974 to 1975: Teaching Fellow, Department of Economics, Boston College, Chestnut Hill, MA.

Summer 1974: Economist, Office of Research and Statistics, Social Security Administration, Washington, DC.

Summer 1973: Economist, Brandeis Labor Market Study, Brandeis University, Waltham, MA.

June 1970 to August 1971: Research Associate, Economics Department, First National City Bank, New York, NY.

## **EDUCATION**

B.A., Economics, Smith College, 1970

M.S./M.A., A.B.D. Ph.D. in Economics, Boston College, 1973.

## **PUBLICATIONS**

### **Journal Articles:**

C. Schoen and S. Collins, The Big Five Health Insurers' Membership And Revenue Trends: Implications For Public Policy, *Health Affairs*, 36:12, Dec. 2017

A. Willink, C. Schoen and K. Davis, *Consideration of Dental, Vision, and Hearing Services to Be Covered Under Medicare*, *JAMA Viewpoint*, June 29, 2017.

A. Willink, C. Schoen and K. Davis, *Dental Care and Medicare Beneficiaries: Access Gaps, Cost Burdens and Policy Options*, *Health Affairs*, December 2016.

K.Davis, A. Willink and C. Schoen, *Integrated Care Organizations: Medicare Financing for Care at Home*, *American Journal of Managed Care*, November 2016.

A. Willink, K. Davis, C. Schoen and J. Wolff, *Physical and/or Cognitive Impairment, Out-of-Pocket Spending and Medicaid Entry Among Older Adults*, *Journal of Urban Health*, Oct 2016:

93(5):840-850

C. Schoen, C. Buttorff, M. Andersen, K. Davis, *Policy Options to Expand Medicare's Low-Income Provisions to Improve Access and Affordability*, *Health Affairs* December 2015.

C. Schoen, Commentary: *Reducing income-related inequalities in care and health: insights from Israel*. *Israel Journal of Health Policy Research*, August 11, 2015.

D. McCarthy, C. Schoen, D. Radley, "State Health System Performance: A Scorecard", *JAMA*. 2014; 312(2):131

C. Schoen, R. Osborn, D. Squires and M. Doty, "Access, Affordability, and Insurance Complexity Are Often Worse in the United States Compared to Ten Other Countries," *Health Affairs*, Web Nov 14, 2013. Print 32 (12) December 2013.

K. Davis, C. Schoen and S. Guterman, "Medicare Essential: an Option to Promote Better Care and Curb Spending Growth," *Health Affairs* 32(5), March 2013.

C. Schoen, et al., "A Survey of Primary Care Doctors in Ten Countries Shows Progress in Use of Health Information Technology, Less in Other Areas," *Health Affairs* 31(12) December 2012.

D. C. Radley and C. Schoen, "Geographic Variation in Access to Care—The Relationship with Quality," *New England Journal of Medicine*, published online June 13, 2012.

C. Schoen, R. Osborn, D. Squires, M. Doty, R. Pierson, S. Applebaum, "New 2011 Survey of Patients with Complex Care Needs in Eleven Countries Finds that Care is Often Poorly Coordinated," *Health Affairs* Vol 30(12) 2011, 1-12.

C. Schoen, M. Doty, R. Robertson, S. Collins, "Affordable Care Act Reforms Could Reduce the Number of Underinsured US Adults by 70 Percent," *Health Affairs* Vol 30, Sep 8, 2011, 1-10.

S. Schoenbaum, C. Schoen, J. Nicholson, J. Cantor, "Mortality amenable to health care in the United States: The roles of demographics and health systems performance," *Journal of Public Health Policy* Vol XX, 2011: 1-22.

C. Schoen, R. Osborn, D. Squires, M. Doty, R. Pierson, S. Applebaum, "How Health Insurance Design Affects Access to Care and Costs, by Income, in Eleven Countries," *Health Affairs* Vol 29, Nov 18, 2010, 2323-2334.

Cathy Schoen, Robin Osborn, Michelle M. Doty, David Squires, Jordon Peugh, and Sandra Applebaum, "A Survey Of Primary Care Physicians In Eleven Countries, 2009: Perspectives On Care, Costs, And Experiences," *Health Affairs* Web Exclusive, Nov. 5, 2009, w1171-w1183.

Karen Davis, Cathy Schoen, Katherine Shea, and Christine Haran, "Aiming High for the U.S. Health System: A Context for Health Reform," *Journal of Law, Medicine & Ethics*, Winter 2008 36(4):629–43.

Cathy Schoen, Robin Osborn, Sabrina K. H. How, Michelle M. Doty, and Jordon Peugh, "In Chronic Condition: Experiences of Patients with Complex Health Care Needs, in Eight Countries, 2008," *Health Affairs* Web Exclusive, Nov. 13, 2008, w1-w16.

Cathy Schoen, Sara R. Collins, Jennifer L. Kriss, and Michelle M. Doty. "How Many Are Underinsured? Trends Among U.S. Adults, 2003 and 2007," *Health Affairs* Web Exclusive, June 10, 2008:w298–w309.

Cathy Schoen, Karen Davis, and Sara R. Collins, "Building Blocks for Reform: Achieving Universal Coverage with Private and Public Group Health Insurance," *Health Affairs*, May/June 2008 27(3):646–57.

Cathy Schoen, Robin Osborn, Michelle M. Doty, Megan Bishop, Jordon Peugh, and Nandita Murukutla, "Toward Higher-Performance Health Systems: Adults' Health Care Experiences in Seven Countries, 2007," *Health Affairs* Web Exclusive October 31, 2007 26(6):w717–w734.

Karen Davis and Cathy Schoen, "State Health System Performance and State Health Reform," *Health Affairs* Web Exclusive, September 18, 2007, w664-w666.

Ira Wilson, Cathy Schoen, Patricia Neuman et al., "Patient-Physician Communication about Prescription Medication Non-Adherence: A 50 State Study of America's Seniors." *Journal of General Internal Medicine*, January 2007 22(1):6-12.

Revital Gross, Hava Tabenkin, Cathy Schoen et al., "Health Counseling for Women in the Absence of Financial Barriers: Comparing Reported Counseling Rates of Women in the United States and Israel," *Women and Health*, 2006, 43(1):1-18.

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Cathy Schoen, Karen. Davis, Sabrina How, and Stephen C. Schoenbaum, "U.S. Health System Performance: A National Scorecard," *Health Affairs* Web Exclusive, September 20, 2006, W457–w475.

Cathy Schoen, Robin Osborn, Phuong Trang Huynh et al., "Taking the Pulse of Health Care Systems: Experiences of Patients with Health Problems in Six Countries," *Health Affairs* Web Exclusive, November 3, 2005, W5-509–W5-525.

Karen Davis, Marilyn Moon, Barbara S. Cooper, and Cathy Schoen, "Medicare Extra: A Comprehensive Benefit Option for Medicare Beneficiaries," *Health Affairs* Web Exclusive, October 4, 2005, W5-442–W5-454.

Cathy Schoen, Michelle M. Doty, Sara R. Collins, and Alyssa L. Holmgren, "Insured but Not Protected: How Many Adults Are Underinsured?" *Health Affairs* Web Exclusive, June 14, 2005, W5-289–W5-302.

Dana Gelb Safran, Patricia Neuman, Cathy Schoen, et al., "Prescription Drug Coverage and Seniors: Findings From a 2003 National Survey," *Health Affairs* Web Exclusive, April 2005, W5-152–W5-166.

Cathy Schoen, Robin Osborn, Phuong Trang Huynh et al., "Primary Care and Health System Performance: Adults' Experiences in Five Countries," *Health Affairs* Web Exclusive, October 28, 2004, W4-487–W4-503.

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Cathy Schoen and Michelle Doty, "Inequities in Access to Medical Care in Five Countries: Findings from the 2001 Commonwealth Fund International Health Policy Survey," *Health Policy*, March 2004 67(3):309-22.

Robert Blendon, Cathy Schoen, Catherine DesRoches et al., "Common Concerns Amidst Diverse Health Care Systems: Sicker Adults' Views and Health Care Experiences in Five Nations," *Health Affairs*, May/June 2003 22(3):106-121.

Karen Davis and Cathy Schoen, "Creating Consensus on Coverage Choices," *Health Affairs* Web Exclusive, April 23, 2003.

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Jon Gabel, Jeremy Pickreign, Heidi Whitmore and Cathy Schoen, "Embraceable You: How Employers Influence Health Plan Enrollment," *Health Affairs*, July/August 2001 20(4):196-208.

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Karen Davis, Cathy Schoen, and Stephen Schoenbaum, "A 2020 Vision for American Health Care," *Archives of Internal Medicine*, December 2000 160(22):3357-62.

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Karen Donelan, Robert Blendon, Cathy Schoen et al., "The Elderly in Five Nations: The Importance of Universal Coverage," *Health Affairs*, May/June 2000 19(3):226-35.

Cathy Schoen and Catherine DesRoches, "Uninsured and Unstably Insured: The Importance of Continuous Insurance Coverage," *Health Services Research* April 2000 35(1 Pt 2):187-206.

Cathy Schoen, Karen Davis, Catherine DeRoches, Karen Donelan and Robert Blendon, "Health Insurance Markets and Income Inequality: Findings from an International Health Policy Survey," *Health Policy*, March 2000, 51(2):67-85.

Tricia Neuman, Cathy Schoen, Diane Rowland et al., "Understanding the Diverse Needs of the Medicare Population: Implications for Medicare Reform," *Journal of Aging and Social Policy*, 1999 10(4):25-50.

Karen Donelan, Robert Blendon, Cathy Schoen et al. "The Cost of Health System Change: Public Discontent in Five Nations," *Health Affairs*, May/June 1999 18(3):206-16.

Cathy Schoen and Catherine DesRoches, "Financing Children's Health Care Needs in the Next Century," *Journal of Urban Health*, December 1998 75(4):639-659.

Karen Davis and Cathy Schoen, "Assuring Quality, Information and Choice in Managed Care," *Inquiry*, Summer 1998 35(2):104-114.

Kathryn Taaffe Young, Karen Davis, Cathy Schoen, and Steven Parker, "Listening to Parents: A National Survey of Parents with Young Children," *Archives of Pediatric and Adolescent Medicine*, March 1998 152(3):255-62.

Cathy Schoen and Elaine Puleo, "Low Income Working Families at Risk: Uninsured and Underserved," *Journal of Urban Health*, March 1998 75(1):30-49, discussion 50-7.

Cathy Schoen, Barbara Lyons, Diane Rowland et al., "Insurance Matters for Low Income Adults," *Health Affairs*, September/October 1997 16(5):163-71.

Karen Scott Collins, Cathy Schoen, and Firuzeh Khorasanizadeh, "Practice Satisfaction and Experiences of Women Physicians in an Era of Managed Care. Analysis of the Commonwealth Fund's 1995 National Survey of Physician Experiences with Managed Care," *Journal of the American Medical Women's Association (JAMWA)*, Spring 1997.

Cathy Schoen and Pamela Davidson, "Image versus Reality: Managed Care Experiences by Type of Plan", 996-97, *Bulletin of the New York Academy of Medicine*, Winter 1997.

Karen Davis, Cathy Schoen, and David Sandman, "The Growth of Managed Care: Implications for Patients," *Bulletin of the New York Academy of Medicine: A Journal of Urban Health*, Summer 1996 73(1):173-83.

Cathy Schoen, "Managed Care: A National Experiment: Unanswered Questions and Potential Risks," *Bulletin of the New York Academy of Medicine*, 1995 72(2 Suppl):645-56.

Karen Davis, Karen Scott Collins, Cathy Schoen and Cynthia Morris, "Choice Matters: Enrollees' Views of Their Health Plans," *Health Affairs*, Summer 1995 14(2):99-112.

Karen Davis and Cathy Schoen, "Universal Coverage: Building on Medicare and Employers Financing," *Health Affairs*, Spring (II) 1994 13(2):7-20.

Cathy Schoen, "Medicaid and the Poor: Medicaid Myths and Reality and the Impact of Recent Legislative Changes," *Bulletin of the New York Academy of Medicine*, January-February 1984.

### **Books, Book Chapters, Monographs, and Non-Refereed Journals:**

C. Schoen, "Policy Alternatives: Employer-Based Approach", K. Appel and B. S. Flowers editors, *Big Choice3s: The Future of Health Insurance for America's Families*, University of Texas, Center for Health and Social Policy, 2005.

Karen Davis, Cathy Schoen, and Karen Scott Collins, Women's Health and Managed Care, in *Women and Health*. Goodman and Hatch eds. San Diego: Academic Press, 2000.

Karen Davis and Cathy Schoen, "Incremental Health Insurance Coverage: Building on the Current System," in *The Future of the American Health Care System: Who Will Care for the Poor and Uninsured*. Altman, Reinhardt, and Shields eds. Chicago, IL: Health Administration Press; 1998.

Karen Davis and Cathy Schoen, "Changing Health Care Systems and Access to Care for the Chronically Ill," in *Changing Health Care Systems and Rheumatic Disease*. Manning and Barondess eds. Washington, DC: Institute of Medicine, National Academy Press, 1996.

Cathy Schoen and Lawrence Zacharias, "Federal and State Public Employees Health Benefit Programs," in *Critical Issues in U.S. Health Reform*. Ginzberg ed. Boulder, CO: Westview Press, 1994.

E. Richard Brown, C. Schoen. J. Kitzhaber, et al. *Health Care: The Crisis and Possibilities for Reform*, LERC Monograph Series, Issue No. 10. University of Oregon: April 1991.

- C. Schoen section: *Paying Too Much, Buying Too Little: U.S. Medicare Care on the Critical list*.

Cathy Schoen and SEIU Research Staff (Prepared for John J. Sweeney and Karen Nussbaum), *Solutions for the New Workforce*, Seven Locks Press, January 1989.

Cathy Schoen, "The Labor Movement in Health Care: United States" in *Industrial Relations and Health Services*. Sethi ed. London: Croom Helm, 1982.

Karen Davis and Cathy Schoen, *Health and the War on Poverty*, Washington DC: Brookings Institution, 1978.

### **Commonwealth Fund and Other Institute Publications:**

A. Willink, C. Schoen, and K. Davis, How Medicare Could Provide Dental, Vision, and Hearing Care for Beneficiaries, The Commonwealth Fund, January 2018.



C. Schoen, K. Davis, and A. Willink, Medicare Beneficiaries' High Out-of-Pocket Costs: Cost Burdens by Income and Health Status, Commonwealth Fund, May 2017.

K. Davis, A. Willink and C. Schoen, Help at Home: Improving Benefits for Medicare Beneficiaries with Physical or Cognitive Impairment. The Commonwealth Fund, October 2016.

A. Willink, K. Davis, and C. Schoen, Risks for Nursing Home Placement and Medicaid Entry Among Older Medicare Beneficiaries with Physical and/or Cognitive Impairment, The Commonwealth Fund, October 2016

C. Schoen, et al. On Medicare but At Risk: A State-Level Analysis of Beneficiaries Who Are Underinsured or Facing High Total Cost Burdens, Commonwealth Fund, May 2016

C. Schoen, The Affordable Care Act and the US Economy: A Five Year Appraisal, Commonwealth Fund, February 2016.

C. Schoen, K. Davis, C. Buttorff, M. Andersen, Modernizing Medicare's Benefit Design and Low- Income Provisions, Commonwealth Fund July 2015.

M. Moon, I. Hollin, L. Nicholas, C. Schoen, and K. Davis, Reforming Medicare to Better Service Beneficiaries with Complex Care Needs, Commonwealth fund, July 2015.

Karen Davis, Cathy Schoen, and Farhan Bandeali, *Medicare: 50 Years of Ensuring Coverage and Care*, The Commonwealth Fund, April 15, 2015,

C. Schoen, D. Radley, and S. Collins. State Trends in the Cost of Employer Sponsored Health Insurance (includes analysis of employee deductibles and premium share trends compared to median income). Commonwealth Fund, January 2015.

S. Collins, C. Schoen, and D. Radley, *National Trends in the Cost of Employer-Sponsored Health Insurance, 2003 to 2013*, Commonwealth Fund, December 2014.

C. Schoen, S. Guterman, M. Zezza, Health Care Cost Trends and Challenges: A Chartbook, August and October 2014 Commonwealth Fund. Also see video and interactive graphic, Fund website.

C. Schoen, S. L. Hayes, D. C. Radley, and S. R. Collins, *Access to Primary and Preventive Health Care Across States Prior to the Coverage Expansions of the Affordable Care Act*, The Commonwealth Fund, July 2014.

K. Davis, K. Stremikis, D. Squires and C. Schoen, *Update 2014: Mirror Mirror on the Wall, How the Performance of the US Health Care System Compares to Other Countries*, Commonwealth Fund, June 2014

D. Radley, D. McCarthy, J. Lippa, S. Hayes, and C. Schoen, *Aiming Higher: Results from a Scorecard on State Health System Performance, 2014*, Commonwealth Fund, May 2014.

C. Schoen, S. Hayes, S. Collins, J. Lippa and D. Radley, *America's Underinsured: A State by State Look at Health Insurance Affordability Prior to the New Coverage Expansions*, Commonwealth Fund, March 2014.

C. Schoen, S. Hayes, and P. Riley, *The Affordable Care Act's New Tools and Resources to Improve Health and Care for Low-Income Families Across the Country*, Commonwealth fund, October 2013.

C. Schoen, et al. *Health Care in the Two Americas: Findings from a State Scorecard on Health System Performance for Low Income Populations*, Commonwealth Fund, September 2013.

C. Schoen, S. Guterman, M. Zezza, and M. Abrams, *Confronting Costs: Stabilizing U.S. Health Spending While Moving Toward a High Performance Health System*, for the Commonwealth Commission on a High Performance Health System, Commonwealth Fund, January 2013.

C. Schoen, D. Radley, J. Lippa, S. Collins, *State Trends in Premiums and Deductibles, 2003-2011: Eroding Protection and Rising Costs Underscore Need for Action*, Commonwealth Fund, December 2012.

Panel on Measuring Medical Care Risk in Conjunction with the New Supplemental Income Poverty Measure, Committee on National Statistics, Division of Behavioral and Social Sciences and Education, and Board on Health Care Services, Institute of Medicine. *Medical Care Economic Risk: Measuring Financial Vulnerability from Spending on Medical Care*. M.J. O'Grady and G.S. Wunderlich, Eds. (Washington, DC: The National Academies Press. National Research Council and Institute of Medicine, September, 2012). (C. Schoen co-author chapter and panel review design report)

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J. Holahan, C. Schoen, S. McMorow, *The Potential Savings from Enhanced Chronic Care Management Policies*, (Washington DC: Urban Institute, December, 2011).

C. Schoen, A. Fryer, S. Collins, D. Radley, *State Trends in Premiums and Deductibles, 2003-2010: The Need for Action to Address Rising Costs*. (New York: The Commonwealth Fund, November 2011).

D. McCarthy, S. How, A. Fryer, D. Radley, and C. Schoen, *Why Not the Best? Results from the National Scorecard on U.S. Health System Performance, 2011*. (New York: The Commonwealth Fund, October 2011).

E. Schor, J. Berenson, A. Shih, S. Collins, C. Schoen, P. Riley, C. Dermody, *Ensuring Equity: A Post-Reform Framework to Achieve High Performance Health Care for Vulnerable Populations*. (New York: The Commonwealth Fund, October 2011).

L. Tollen, A. Enthoven, F. Crosson, N. Taylor, A. Audet, C. Schoen, M. Ross, *Delivery System Reform Tracking: A Framework for Understanding Change*. (New York: The Commonwealth Fund, June 2011).

S. Guterman, S. Schoenbaum, K. Davis, C. Schoen, A. Audet, KI. Stremikis, M. Zezza, *High Performance Accountable Care: Building on Success and Learning from Experience*. (New York: The Commonwealth Fund, April 2011).

K. Stremikis, C. Schoen, A. Fryer, *Toward a More Patient-Centered, Accountable U.S. Health Care System: The Commonwealth Fund 2011 Survey of Public Views of the U.S. Health System*. (New York: The Commonwealth Fund, April 2011)

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C. Schoen, K. Stremikis, S. How, S. Collins, *State Trends in Premiums and Deductibles, 2003-2009: How Building on the Affordable Care Act Will Help Stem the Tide of Rising Costs and Eroding Benefits* (New York: The Commonwealth Fund, December 2010).

K. Davis, C. Schoen, K. Stremikis, *Mirror, Mirror on the Wall: How the Performance of the U.S. Health Care System Compares Internationally, 2010 Update* (New York: The Commonwealth Fund, June 2010).

C. Schoen, D. Helms, and A. Folsom, *Harnessing Health Care Markets for the Public Interest: Insights for U.S. Health Reform from the German and Dutch Multipayer Systems*, The Commonwealth Fund and AcademyHealth, December 2009.

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C. Schoen, J. L. Nicholson, and S. D. Rustgi, *Paying the Price: How Health Insurance Premiums Are Eating Up Middle-Class Incomes—State Health Insurance Premium Trends and the Potential of National Reform* (New York: The Commonwealth Fund, August 2009).

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S. R. Collins, R. Nuzum, S. Rustgi, S. Mika, C. Schoen, and K. Davis, *How Health Care Reform Can Lower the Costs of Insurance Administration* (New York: The Commonwealth Fund, July 2009).

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Cathy Schoen (lead author), The Commonwealth Fund Commission on a High Performance Health System, *The Path to a High Performance U. S. Health System: A 2020 Vision and the Policies to Pave the Way* (New York: The Commonwealth Fund, February 2009).

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Sara Collins, Cathy Schoen, Michelle Doty, Alyssa Holmgren, *Job-Based Health Insurance in the Balance: Employer Views of Coverage in the Workplace* (New York: The Commonwealth Fund, March 2004).

Sara Collins, Michelle Doty, Karen Davis, Cathy Schoen, Alyssa Holmgren, and Alice Ho, *The Affordability Crisis in U.S. Health Care: Findings from the Commonwealth Fund Biennial Health Insurance Survey* (New York: The Commonwealth Fund, March 2004).

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Pamela Farley Short, Deborah R. Graefe, and Cathy Schoen, *Churn, Churn, Churn: How Instability of Health Insurance Shapes America's Uninsured Problem* (New York: The Commonwealth Fund, November 2003).

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Sara Collins, Cathy Schoen, Diane Colasanto, and Deirdre Downey, *On the Edge: Low-Wage Workers and Their Health Insurance Coverage* (New York: The Commonwealth Fund, March 2003).

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Cathy Schoen et al., *Comparison of Health Care System Views and Experiences in Five Nations, 2001; Australian Adults' Health Care Views and Experiences, 2001; Canadian Adults' Health Care Views and Experiences, 2001; New Zealand Adults' Health Care Views and Experiences, 2001; UK Adults' Health Care Views and Experiences, 2001; US Adults' Health Care Views and Experiences, 2001* (New York: The Commonwealth Fund, May 2002).

Lisa Duchon, Cathy Schoen, Michelle M. Doty, Karen Davis, Erin Strumpf, and Stephanie Bruegman, *Security Matters: How Instability in Health Insurance Puts U.S. Workers at Risk* (New York: The Commonwealth Fund, December 2001).

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Kevin Quinn, Cathy Schoen, and Louisa Buatti, *On Their Own: Young Adults Living Without Health Insurance*, (New York: The Commonwealth Fund, May 2000).

John Budetti, Cathy Schoen, Elisabeth Simantov, and Janet Shikles, *Risks for Midlife Americans: Getting Sick, Becoming Disabled, or Losing a Job and Health Coverage* (New York: The Commonwealth Fund, January 2000).

Lisa Duchon, Cathy Schoen, Elisabeth Simantov, Karen Davis, and Christina An, *Listening to Workers: Challenges for Employer-Sponsored Coverage in the 21<sup>st</sup> Century* (New York: The Commonwealth Fund, January 2000).

Cathy Schoen, Erin Strumpf, and Karen Davis, *A Vote of Confidence: Attitudes Towards Employer-Sponsored Health Insurance* (New York: The Commonwealth Fund, January 2000).

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Anna Aizer, Marsha Gold, and Cathy Schoen, *Managed Care and Low-Income Populations: Four Years' Experience with Tennessee, Update of July 1995 report* (The Henry J. Kaiser Family Foundation/The Commonwealth Fund, May 1999).

Cathy Schoen, Patricia Neuman, Michelle Kitchman, Karen Davis, and Diane Rowland, *Medicare Beneficiaries: A Population at Risk: Findings from the Kaiser/Commonwealth Fund 1997 Survey of Medicare Beneficiaries* (New York: The Commonwealth Fund, December 1998).

Cathy Schoen and Karen Davis, *Erosion of Employer-Sponsored Health Insurance Coverage and Quality* (New York: The Commonwealth Fund, September 1998).

Kathryn Taaffe McLearn, Diane Colasanto, and Cathy Schoen, *Mentoring Makes a Difference: Findings from The Commonwealth Fund 1998 Survey of Adults Mentoring Young People* (New York: The Commonwealth Fund, July 1998).

Cathy Schoen, Karen Davis, Catherine DesRoches, and Alexander Shekhdar, *The Health of Adolescent Boys: Commonwealth Fund Survey Findings* (New York: The Commonwealth Fund, June 1998).

Cathy Schoen and Catherine DesRoches, *New York City's Children: Uninsured and at Risk, Findings from The Commonwealth Fund Survey of Health Care in New York City* (New York: The Commonwealth Fund, May 1998).

Cathy Schoen, Cathy Hoffman, Diane Rowland, Karen Davis, and Drew Altman, *Working Families at Risk: Coverage, Access, Costs, and Worries, Kaiser/Commonwealth 1997 National Survey of Health Insurance* (New York: The Commonwealth Fund, April 1998).

David Sandman, Cathy Schoen, Catherine DesRoches, and Meron Mackonnen, *The Commonwealth Fund Survey of Health Care in New York City* (New York: The Commonwealth Fund, February 1998).

Cathy Schoen, Karen Davis, Karen Scott Collins, Linda Greenberg, Catherine DesRoches, and Melinda Abrams, *The Commonwealth Fund Survey of the Health of Adolescent Girls* (New York: The Commonwealth Fund, November 1997).

Cathy Schoen, *Facts on Risky Behaviors from The Commonwealth Fund Survey of the Health of Adolescent Girls* (New York: The Commonwealth Fund, September 1997).

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Cathy Schoen, *Facts on Mental Health from The Commonwealth Fund Survey of the Health of Adolescent Girls* (New York: The Commonwealth Fund, September 1997).



Cathy Schoen, *Facts on Abuse and Violence with from The Commonwealth Fund Survey of the Health of Adolescent Girls* (New York: The Commonwealth Fund, September 1997).

Cathy Schoen, *Facts on Communication with Physicians from The Commonwealth Fund Survey of the Health of Adolescent Girls* (New York: The Commonwealth Fund, September 1997).

Cathy Schoen, *Facts on Access to Health Care from The Commonwealth Fund Survey of the Health of Adolescent Girls* (New York: The Commonwealth Fund, September 1997).

Karen Davis and Cathy Schoen, *Managed Care, Choice, and Patient Satisfaction* (New York: The Commonwealth Fund, August 1997).

Karen Scott Collins, Cathy Schoen, and David R. Sandman, *The Commonwealth Fund Survey of Physician Experiences with Managed Care* (New York: The Commonwealth Fund, March 1997).

Kathryn Taaffe Young, Karen Davis, and Cathy Schoen, *The Commonwealth Fund Survey of Parents with Young Children* (New York: The Commonwealth Fund, August 1996).

Karen Davis and Cathy Schoen. *Uninsured in America: Causes, Consequences and Coverage Options*. Paper presented at *The Future U.S. Health Care System: Who Will Finance and Deliver Care for the Poor and Uninsured?*, sponsored by the Council on the Economic Impact of Health System Change, Princeton, New Jersey, May 10-11, 1996.

Karen Davis and Cathy Schoen, *Health Services Research and the Changing Health Care System* (New York: The Commonwealth Fund, March 1996).

Nancy M. Kane, Nancy C. Turnbull, and Cathy Schoen, *Markets and Plan Performance: Case Studies of IPA and Network HMOs* (New York: The Commonwealth Fund, January 1996).

Karen Davis and Cathy Schoen, *Managing Care in the Public Interest: Protecting Access, Quality and Patients in a New Era of Managed Care*, January 1996.

Michael Sparer, Marilyn Ellwood, and Cathy Schoen, *Managed Care and Low Income Populations: A Case Study of Managed Care in Minnesota* (Washington, DC: Kaiser Family Foundation and The Commonwealth Fund, November 1995).

Marsha Gold, Hilary Frazer and Cathy Schoen, *Managed Care and Low-Income Populations: A Case Study of Managed Care in Tennessee* (Washington, DC: Kaiser Family Foundation and The Commonwealth Fund, July 1995).

## **SELECTED CONGRESSIONAL and Other TESTIMONY/BRIEFS**

C. Schoen, U.S. Health Reforms to Improve Access Outcomes and Value: International Insights and Innovative Policies, Hearing on "Achieving Health Reform's Ultimate Goal: How Successful Health Systems Keep Costs Low and Quality High," Senate Special Committee on Aging, September 30, 2009.

K. Davis and C. Schoen, Putting the U.S. Health System on the Path to High Performance, Hearing on "Health Reform in the 21st Century: Expanding Coverage, Improving Quality, and Controlling Costs," U.S. House of Representatives, Committee on Ways and Means, March 11, 2009.

C. Schoen, Insurance Design Matters: Underinsured Trends, Health and Financial Risks, and Principles for Reform, Hearing on "Addressing the Underinsured in National Health Reform," U.S. Senate Health, Education, Labor and Pensions Committee, February 24, 2009.

K. Davis and C. Schoen, Using What Works: Medicare, Medicaid, and the State Children's Health Insurance Program as a Base for Health Care Reform, Invited Testimony, House Committee on Energy and Commerce, Subcommittee on Health Hearing on "America's Need for Health Reform," September 18, 2008.

J. Tallon and Cathy Schoen, *Blueprint for Universal Coverage in New York*, Testimony Before the New York State Assembly: Committees on Health, Insurance and Labor, March 9, 2007.

D. Holahan, P. Newell, and C. Schoen, Testimony of the United Hospital Fund and The Commonwealth Fund, The New York State Insurance Department and New York State Department of Health "Partnership for Coverage" Public Hearing, December 5, 2007.

Cathy Schoen, Analysis of Proposed National Labor Relations Board Health Care Bargaining Unit Rule, and Analysis of Hospital Organizing and Bargaining History since 1939, presented to the National Labor Relations Board, Administrative Law Hearings, October 14, 1987.

Cathy Schoen, Work and Family in Conflict: New Job Policies Erode Family Living Standards, Testimony before the House Select Committee on Children, Youth and Families, July 1, 1987.

Cathy Schoen, Medicare at the Crossroads: Corporatization of Health Delivery, House Select Committee on Aging, June 13, 1983.

Cathy Schoen, Healthcare Cost Control Act of 1983, Subcommittee on Health, House Committee on Ways and Means, September 28, 1983.

Cathy Schoen, Effect of TEFRA and Implications for the Future: Will Patients and Workers Be Hurt?, Presentation for the Government Research Corporation's Eighth Annual Leadership Conference on Health Policy, June 16, 1983.

Cathy Schoen, Medicare Budget Proposals, House Ways and Means, April 16, 1985.

Cathy Schoen, Health Care Competition Proposals, H. R. 850, S.139, S. 433, before the House Ways and Means Committee, Subcommittee on Health, September 30, 1981.

### **Recent Conference Papers and Presentations: Keynote or Lead Presentations**

C. Schoen, *Closing the Gaps in State Health System Performance*, Southern Medical Association, March Symposium, Annual. March 2018 and March 2017.

C. Schoen, *Confronting Costs: State Options to Take Action*, National Conference State Legislatures, Senior State Legislative Staff Forum, New Orleans, October 2016. With posted chart-pack.

C. Schoen, *An International Perspective on U.S. Health System and Policy – Looking Forward*, *Brown University Lecture*, Executive Master Healthcare Leadership Program, August 2016. (also previous years lecture) .

C. Schoen, *Bending the Cost Curve: Trends and Options for Action*, *National Conference of State Legislatures Forum*, Chicago August 10, 2016.

C. Schoen, *Closing Gaps in U.S. Health Care: Opportunities to Take Action to Improve – Focus on Southern States*, Southern Medical Association, Medico Legal Aspects of Healthcare, March 2016.

C. Schoen, *Confronting Costs: Understanding Key Drivers and Opportunities for State Policy Action*. Washington DC: National Conference of State Legislators (NCSL), Dec 8, 2015.

Medicare's Future Panel/Papers: Association for Public Policy and Management Nov 14, 2015:

- C. Schoen, et al. *Modernizing Medicare's Benefits to Meet the Needs of Beneficiaries – Especially Low-Income Complexly Ill Beneficiaries*, Nov 14, 2015. Paper and presenter
- S. Guterman, C. Schoen, K. Davis and G. Anderson, *Confronting Costs. Medicare payment Innovation – Opportunities to Build and Spread*. Co-author paper.
- Organized panel accepted by APPAM.

C. Schoen, *Towards a High Performing Health System*, Society of American Business Editors and Writers (SABEW), Berkshires Conference, Nov. 9, 2015.

C. Schoen, *Mirror on the Wall: U.S. from an International Perspective*, University of Pennsylvania, Global Bioethics Lecture, March 2015.

C. Schoen, *Learning Globally –Acting Locally: What the US Health Care System Can Learn from Other Countries*, Boston University Charles L. Donahue Frontiers in Public Health Speaker Series, Boston December 2, 2014

C. Schoen, *How We Pay Matters: Bundling and Other U.S. Payment Reforms*, Canada Activity Based Payment Forum, Toronto, Canada December 4, 2014

C. Schoen Panelist and Moderator: *Health Cost Trends, Key Issues, and Implications for Policy Action*, Commonwealth Fund Board of Directors, NY July 2014

C. Schoen, *Reengineering Care for the 21<sup>st</sup> Century: Toward High Performance Health Systems, Insights from International Perspectives*, Sydney, Australia June 2014.

C. Schoen, *How We Pay Matters: Payment and Health System Innovation*, IHPA Activity Based Funding Conference, Melbourne, Australia June 24, 2014

C. Schoen, *Children’s Health Insurance Coverage: Progress, Challenges and Opportunities*, Academy Health Annual Research Meeting, San Diego, CA June 2014.

C. Schoen, *Closing Gaps in U.S. Health Care: Opportunities to Take Action to Improve*, Southern Medical Association, Medico Legal Aspects of Healthcare, March 18, 2014.

C. Schoen, *Insurance Benefits Matter: The Underinsured – Implications for Reform. Road Map to ACA: Primary Care and the Underinsured*, NM Care Disparities Center, Albuquerque, UNM November 22, 2013.

C. Schoen, *Health Care in the Two Americas: Closing the Income and Geographic Divide*, Milbank Reforming States Group, Chicago Sept. 2013. Charleston SC Oct 2013

C. Schoen, *Affordable Care Act Provisions: Focus and Opportunities*. Progressive States’ Network, ACA 101 Webinar, June 2013

C. Schoen, *Confronting Costs on a Path to a High Performance Health System*, Maine Quality Counts Triple Aim Series, May 2013

C. Schoen, *How Do They Do It? U.S. Health System Performance – An International Perspective*, American College of Physicians Internal Medicine Meeting, San Francisco April 2013

C. Schoen, *Confronting Costs While Improving Value*, Bipartisan Congressional Staff Retreat, Feb 2013

C. Schoen, *Confronting Costs: Stabilizing US Health Spending While Moving Toward a High Performance System*, Bipartisan Congressional Health Policy Conference, Jan. 2013

C. Schoen, *Rising to the Challenge: Gaps in Health System Performance = Opportunities to Improve*. Congress House Health Care Innovation Task Force Briefing, May 17, 2012

C. Schoen and P. Riley, *Closing Gaps in US Health Care: New Opportunities for Action*, Southern Medical Association, 2012 Healthcare Summit, Nov. 2012.

C. Schoen, *Learning Globally – Acting Locally, Insights from International Health Systems Innovations*, Global Business Group on Health, Board Meeting, August 2012.

C. Schoen, *Improving Care and Managing Costs: Team-Based Care for the Chronically Ill, High Cost Beneficiaries: What Can States Do?* Princeton Conference: States' Roles in Health Reform, May 2012

C. Schoen, *State and Local Health System Performance: Using Data and Targets to Inform Efforts to Improve*, Briefing CMMS staff state innovation group, May 2012.

C. Schoen, *Rising to the Challenge: Gaps in Health System Performance = Opportunities to Improve*, US House of Representatives, Health Care Innovation Task Force Briefing, May 2012.

C. Schoen, *Price Variation, Cost Increases and Implications for Policy*, Bipartisan Congressional Health Policy Conference, Florida, Jan. 2012.

C. Schoen, *State-based Single-payer Discussion Forum Payment Rates and Methods: Single Payer Design Issues*, Minnesota, Millbank Memorial Fund, Sept 2011.s

C. Schoen, *Opportunities to Improve Health Care Delivery System Performance* University of Massachusetts Medical School Perspective on Health Care Series, Worcester, MA 22-Oct-10

C. Schoen, *Aiming High: Toward a High Performance, Value-Based Health System*, Massachusetts Health Council, 2008 Massachusetts Health Care Summit: The Road to Affordability Forum Waltham, MA

**Other Monographs and Proceedings:**

L. S. Zacharias & C. A. Schoen, "Flexible Production Systems, Workforce Polarization, and Worker Collective Action", in *Industrial Relations Research Association, Proceedings of the Forty-Seventh Annual Meeting*, January 1995:207-215.

Cathy Schoen for the Partnership for Quality, *Doubling Public Costs While Losing Control. A Preliminary Analysis of the Massachusetts' Department of Mental Health contract with New England Deaconess Hospital to provide acute inpatient care*, October 1993.

Cathy Schoen, "Paying Too Much, Buying Too Little: U.S. Health Care on the Critical List", in *Health Care: The Crisis and Possibilities for Reform, LERC Monograph Series*, Issue No. 10, University of Oregon, Labor Education and Research Center, April 1991.

Cathy Schoen, "Health Care Costs As a Bargaining Issue: A Union View," *Proceedings of the New York University Annual Conference on Labor*, Summer 1984.

Cathy Schoen, "Medicaid: Costs and Lessons," *Medicaid Payment for Hospital Services: Plain Talk About What Has Happened and What Should Be Done, Proceedings of Four Regional Conferences*, American Hospital Association, November 1983.

Cathy Schoen, *Comprehensive Health Care Centers*, Monograph for the Department of Health and Human Services, 1981.

Cathy Schoen and Christopher Bladen, "Comments in Response to the Federal Trade Commission's Proposed Over-the-Counter Drug Rule," *FTC Hearing Proceedings*, June 17, 1977.

Cathy Schoen, "Neighborhood Health Centers: A Study of Studies," *Kapitalistate*, Spring 1978.

Cathy Schoen, "Financing Rural Health Care Needs," *American Medical Association Conference on Rural Health*, March 1977.

Cathy Schoen, "National Health Insurance: Why We Need It," *Rural Health Communications*, May 1977.

**Other Papers/Presentations:**

Cathy Schoen, *Women and Caregiving: Roles, Health Effects and the Need for Support*, Women as Caregivers Cradle to Grave Conference, Charlottesville, VA June 2003.

Cathy Schoen, *On Their Own: Young Adults Living Without Health Insurance*, Families USA, January 2001.

Cathy Schoen, *Using Surveys to Inform Public Concerns*, Health Service Research Methods, VA, September 1999.

Cathy Schoen, *The Future of Health Insurance for Working Americans: What will be the role of Employer Coverage in the 21<sup>st</sup> Century?* Industrial Relation and Research Assn Conference, Washington DC, June 18, 1999.

Cathy Schoen, *Financing Children's Health Care in the Next Century*, Margaret Mahoney Symposium, NY, Academy of Medicine, May 1998.

Cathy Schoen, *Experimenting with Vulnerable Populations: Comments and Recommended Changes to California Draft Strategic Plan for Medicaid*, February 1993

Cathy Schoen, Medicare and Managed Care: Protecting Patients, Seton Hall Law School Symposium, November 1995.

Cathy Schoen and Partnership for Quality Care, *Making Quality the Bottom Line: A Positive Agenda for the Department of Mental Retardation*, (Schoen at UMASS Labor Relations and Research Center) For the Massachusetts Dept. of Mental Retardation, May 28, 1991.

Cathy Schoen, Managed Care: Accountable to Whom? For What? Presentation at the American Public Health Association Meetings, October, 1995.

Cathy Schoen, Public Sponsored Health Programs and Their Impact on Business and Labor, Los Angeles United Way, February 18, 1982.

Cathy Schoen, The Union as Partner in Controlling Healthcare Costs, Business Week Conference on Cost Effective Strategies for Corporate Healthcare, Paper and speech, November 10, 1980.

Cathy Schoen, Cost and Cost Containment in Ambulatory Health Care Delivery, American Public Health Association Meetings, Washington, DC, November 1977.

Cathy Schoen, "Resolving Conflict Through Increasing Productivity," Keynote Address to the National Health Forum, New York, NY, March 24, 1977.

Karen Davis and Cathy Schoen, "National Health Insurance and Primary Care", paper presented to the American Public Health Association, Miami, October 1976.

Cathy Schoen, "A Review of Quality Assessment Methods Relevant to Evaluation of Rural Practice," for the Robert Wood Johnson Foundation, Paper August, 1976, Brookings Institution.

Cathy Schoen, Project Report on the Rural Practice Project, to the Robert Wood Johnson Foundation, processed Brookings Institution, January 1977.

## **ADVISORY AND STUDY PANELS OUTSIDE COMMONWEALTH FUND**

2014- 2016: Bureau of Health Information, New South Wales, Australia, *Scientific Advisory Committee*. Review and advice for health-system tracking reports and metrics.

January 2011 to September 2012: National Research Council and Institute of Medicine, Medical Care Economic Risk. (Issued final report Sept 2012)

January – December 2002: Committee on the Uninsured, Subcommittee on Family Impacts, Institute of Medicine.

February 1999 to January 2000: Committee on Immunization Finance Policies and Practices, Institute of Medicine.

1993-1996: Elected Member Board Kaiser Permanente, NE Region, Amherst, MA.

Fall 1990 to 1993: Board of Economic Advisors, Ways and Means Committee, Assembly, State of New York.

1989-90: Advisory Panel, Institute for Women's Policy Research, Study on the Impact of the Pregnancy Discrimination Act of 1978. Ford Foundation funded study.

February 1987 to December 1988: Office of Technology Assessment Study: "Quality of Medical Care: Information for Consumers" Results published Spring 1988.

Spring 1986 to April 1989: Advisory Panel and Grant Awards for the National Academy of Sciences Pay Equity Research Project. Publication 1989.

February 1985-1986: U.S. Office of Technology Assessment on International Competition in the Service Sector project.

1984: U.S. Office of Technology Assessment, Health Technology and Worker Displacement.

October 1984: U.S. Government Accounting Office, Health Cost Containment Report. Published report 1985.

December 1981 to December 1982: Technical Committee for Department of Health and Human Services Urban Clinic Demonstration Project.

Fall 1980-Winter 1981: Consultant for the Institute of Medicine Study of Community Integration of Federal Health Services.

September 1979: Review Panel for Department of Health and Human Services Financially Distressed Hospital Grant Program.



## **SEIU Publications:**

Health Care Cost Crisis: Why Benefits Costs are Increasing and What We Can Do About It. June 1989.

Health Benefits Bargaining Manual, 1983; Revised, February 1989.

The Service Economy: Portrait of a New Workforce, June 1987.

The Decline in U.S. Work and Living Standards Require Solutions for the New Workforce. Research monograph, September 1987.

Pay Equity Bargaining Manual, Volumes I and II, January 1985.

SEIU Policy Manual: Federal Budget and Tax Analysis, Spring 1982.

Health Care Workers and the Industry, Series of Monographs, June 1981.

## **FELLOWSHIPS AND AWARDS**

Sydney S. Cohen Prize in Economics, Smith College, 1970.

Distinction in Economics, Smith College, 1970.

Graduate Fellowships in Economics, Boston College, 1971-73.

Brookings Dissertation Fellowship in Economics, 1975/76.

U.S. Department of Health, Education and Welfare, 1979:

Award for Contribution to Major Health Legislative Initiatives.

## **GRANTS**

C. Schoen Principal Investigator: Health Insurance Market Dynamics. August 2016 through Fall 2016. Commonwealth Fund grant through NY Academy of Medicine.

C. Schoen. Executive Director, Cost Containment Initiative, September 2014 through July 2016. Research analyses and lead council of economic advisors. Commonwealth Fund grant through NYU Wagner Policy Center.

C. Schoen. Task for on the Future of Health Insurance 1993 through 1995: Grant from Commonwealth Fund for research analyses and directing new initiative. Grant through University of Massachusetts, School of Public Health.