

Resume

A. James (Jim) Lee, PhD
Healthcare Economist
AJL Health Economics

Education

- | | | |
|-----------|-----|---|
| 1970-1976 | PhD | Economics University of Wisconsin (Madison, WI) |
| | | Major: Public Economics Minor: Operations Research and Administrative Science |
| | | Dissertation: <i>The Economics of Compulsory Schooling</i> Advisor: Burton A. Weisbrod |
| 1970-1972 | MA | Economics University of Wisconsin (Madison, WI) |
| 1966-1970 | BA | Economics and Mathematics St. Olaf College (Northfield, MN) |

Experience

- | | |
|-----------|--|
| 2016 - | Principal AJL Health Economics (Lowell, MA) |
| 2005-2016 | Associate Professor (with tenure) Program Director for Health Informatics and Management Graduate/Master's program Department of Community Health and Sustainability University of Massachusetts Lowell (Lowell, MA) |
| 1999-2008 | Senior Scientist (part-time) Schneider Institute for Health Policy, The Heller School for Social Policy and Management, Brandeis University (Waltham, MA) |
| 1998-2005 | Partner Lee Analytics (Lowell, MA) |
| 1990-1998 | Vice President Health Economics Research, Inc. (Waltham, MA) **now part of RTI** |

- 1989-1990 Deputy Director and State Economist
Maine State Planning Office (Augusta, ME)
- 1986-1989 Senior Consultant
1981-1984 Arthur D. Little (Cambridge, MA)
- 1984-1985 Vice President, Research, Development and Planning
Mutual Health Services
Blue Cross and Blue Shield of Northern Ohio (Cleveland, OH)
- 1975-1981 Senior Economist
Abt Associates (Cambridge, MA)

Research and Contracts (selective)

- 2011-2015 Principal Investigator, Comparative Analysis of Alternative Primary Care Models in Institutional Long Term Care Residents Using the Medicare Current Beneficiary Survey, University of Massachusetts Lowell Interdisciplinary Seed Grant. Total award: \$15,000.
- 2009-2010 Co-Principal Investigator, Community Health Needs Assessment for the Greater Lowell Health Alliance/Community Health Network Area 10, Lowell General Hospital and Saints Medical Center. Total award: \$20,000
- 2009-present Co-Principal Investigator, A Community Partnership for Prevention of Type-2 Diabetes in Youth at High Risk, University of Massachusetts Life Sciences Moment Fund. Total award: \$200,000
- 2007-2009 Co-Principal Investigator (Lowell), Expanding Access: Taking a Local Approach to the Development and Delivery of Online and Blended Learning Programs, a University of Massachusetts System grant from the Alfred P. Sloan Foundation. Total UML award: \$115,000.
- 2000-2009 Co-Investigator, Evaluation of the Medicare Lifestyle Demonstration Project, CMS.
- 2002-2003 CSAT & DPH (MA), Rate Setting for Residential Substance Abuse Treatment Programs
- 1999-2001 DMA (MA), Estimating the Need and Costs of Interpreting for MassHealth Participants

| | |
|-----------|--|
| 2001 | State of West Virginia, Financial & Economic Analysis of Rural Hospitals |
| 1999 | DMH (MA), Business & Financial Planning for a Cambodian Mental Health Clinic |
| 1995-1998 | HCFA, Per Case Prospective Payment for Episodes of Hospital Care |
| 1991-1995 | AHCPR, Post-Stroke Rehabilitation Guidelines Panel |
| 1991-1995 | RWJ, Racial Disparities in Procedure Use among Medicare Beneficiaries |
| 1993-1994 | HCFA, Evaluation of Global Budgeting Strategies |
| 1992-1996 | HCFA, Evaluation of Medicare SELECT Amendments |
| 1993-1997 | HCFA, Evaluation of the Medicaid Expansion Demonstration |
| 1995-1998 | HCFA, Evaluation of the Oregon Health Plan |

Academic Publications (selective)

| | |
|------|---|
| 2016 | Lee, A.J, Gautam, R., Melillo, K.D., Abdallah, L.M., Remington, R., Van Etten, D., and Gore, R., "A Medicare Current Beneficiary Survey-Based Investigation of Alternative Primary Care Models in Nursing Homes: Cost and Utilization Differences," <i>Research in Gerontological Nursing</i> , 9 (3), 115-21, May/June 2016. |
| 2015 | Melillo, K.D., Remington, R., Abdallah, L.M., Gautam, R., Lee, A.J., Van Etten, D., & Gore, R.J., "Comparison of Nurse Practitioner and Physician Practice Models in Nursing Facilities," <i>Annals of LongTerm Care</i> , 23 (12), 19-24. |
| 2015 | Mullaney, S.E., Melillo, K.D., Lee, A.J., and MacArthur, R., "The association of nurse practitioners' mortality risk assessments and advance care planning discussions on nursing home patients' clinical outcomes," <i>Journal of the American Association of Nurse Practitioners</i> , 28 (2016), 304-10. |
| 2015 | Abdallah L., Van Etten D., Lee A.J., Melillo, K.D., Remington, R., Gautam, R., & Gore, R.J., "A Medicare Current Beneficiary Survey-Based Investigation of Alternative Primary Care Models in Nursing Homes: Functional Ability and Health Status Outcomes," <i>Research in Gerontological Nursing</i> . 2015: 1-9. |

- 2012 Markkanen, P., Abdallah, L, Lee, A.J. and Gautam, R., "Long-Term Care in the United States and Finland: Policy Lessons to be Learned" *Journal of Gerontological Nursing*, 38(12), pp. 16-21, December 2012.
- 2010 Lee, A.J., "An Investigation of Scale Effects in Family Substance Abuse Treatment Programs," *Substance Abuse Treatment, Prevention, and Policy* 2010, 5:14.
- 2010 Lee, A.J., Strickler, G.S. and D.S. Shepard, "Chapter 4—The Economics of Cardiac Rehabilitation and Lifestyle Modification: A Review of Literature," in Donald S. Shepard, ed., *Lifestyle Modification to Control Heart Disease: Evidence and Policy*, Sudbury, Massachusetts: Jones & Bartlett, 2010.
- 2009 Lee, A.J. and Shepard, D.S., "Costs of Cardiac Rehabilitation and Enhanced Lifestyle Modification Programs," *Journal of Cardiovascular Rehabilitation and Prevention*, 27(6):348-357, November/December 2009.
- 2008 Lee, A.J. and Cornish, M.R., "Towards Greater Equity and Efficiency in Rate Setting: The Adult Residential Rehabilitation Programs in Massachusetts," *Journal of Public Health Management and Practice*, Vol. 14, No. 4, pp. 387-395, July-August 2008
- 2007 Lee, A.J., Strickler, G.S. and D.S. Shepard, "The Economics of Cardiac Rehabilitation and Lifestyle Modification: A Review of Literature," *Journal of Cardiovascular Rehabilitation and Prevention*, 27(3):135-142, May/June 2007
- 1999 Lee, A.J., "Common Mistakes in Cost-Effectiveness Analysis," *Pharmaceutical Executive*, Vol. 19, No. 2, pp. 78-86, February 1999.
- 1998 Lee, A.J., C.S. Baker, S. Gehlbach, D.W. Hosmer and M. Reti, "Do Black Elderly Medicare Patients Receive Fewer Services? An Analysis of Procedure Use for Selected Patient Conditions," *Medical Care Research and Review*, Vol. 55, No. 3, pp. 314-333, September 1998.
- 1997 Lee, A.J., S.A. Garfinkel, R.K. Khandker and E.C. Norton, "The Impact of Medicare SELECT on Cost and Utilization in 11 States," *Health Care Financing Review*, Vol. 19, No. 1, pp. 19-40, Fall 1997.
- 1997 Lee, A.J., "The Role of Financial Incentives in Shaping Clinical Practice Patterns and Practice Efficiency," *American Journal of Cardiology*, Vol. 80, No. 8B, pp. 28H-32H, October 30, 1997.
- 1997 Lee, A.J., S. Gelbach, D. Hosmer, M. Reti and C.S. Baker, "Medicare Treatment Differences for Blacks and Whites," *Medical Care*, Vol. 35, No. 12, pp. 1173-1189, December 1997.

- 1997 Lee, A.J., J.H. Huber and W.B. Stason, "Factors Contributing to Practice Variation in Post-Stroke Rehabilitation," *Health Services Research*, Vol. 32, No. 2, pp. 197-221, June 1997.
- 1996 McCormack, L.A., S.A. Garfinkel, J.A. Schnaier, A.J. Lee and J.A. Sangl, "Consumer Information Development and Use," *Health Care Financing Review*, Vol. 18, No. 1, pp. 15-30, Fall 1996.
- 1996 McCormack, L.A., Schnaier, A.J. Lee and S.A. Garfinkel, "Medicare Beneficiary Counseling Programs: What Are They and Do They Work?," *Health Care Financing Review*, Vol. 18, No. 1, pp. 127-140, Fall 1996.
- 1996 Lee, A.J., R.P. Ellis and A.R. Merrill, "Bundling Post-Acute Care (PAC) with Medicare DRG Payments: An Exploration of the Distributional and Risk Consequences," *Inquiry*, Vol. 33, pp. 283-291, Fall 1996.
- 1996 Lee, A.J., J. Huber and W.B. Stason, "Poststroke Rehabilitation in Older Americans: The Medicare Experience," *Medical Care*, Vol. 34, No. 8, pp. 811-825, August 1996.
- 1994 Lee, A.J. and J.B. Mitchell, "Physician Reaction to Price Changes--An Episode of Care Analysis," *Health Care Financing Review*, Vol. 16, No. 2, pp. 65-84, Winter 1994.
- 1993 Lee, A.J., "A Primer on Managed Care," *Journal of Health and Human Resources Administration*, Vol. 16, No. 2, pp. 144-156, Fall 1993.
- 1992 Lee, A.J., "Key Factors Affecting the Future of Managed Care," *Topics in Health Care Financing*, Vol. 19:2, pp. 83-88, Winter 1992.
- 1985 Lee, A.J., H. Wolfe and B. Swenson, "Hospital-Based Versus Free-Standing Ambulatory Care Costs: A Comparison," in Norbert Goldfield and Seth B. Goldsmith eds., *Financial Management of Ambulatory Care*, Rockville, Maryland: Aspen Systems Corporation, 1985, 91-106.
- 1984 Wolfe, H.B., A. Venable and A.J. Lee, "The Bedford-Stuyvesant/Crown Heights Demonstration Project," *Health Care Financing Review*, Vol. 5, No. 4, pp. 63-69, Summer 1984.
- 1984 Bentkover, J.D., R.E. Schroeder and A.J. Lee, "Effects of Rate Review on the Financial Viability of New York Hospitals: A Retrospective Assessment," *Hospital and Health Services Administration*, Vol. 30, No. 3, pp. 94-105, May/June 1984.

- 1984 Lee, A.J., H. Wolfe and B. Swenson, "A Comparison of Hospital-Based vs. Freestanding Ambulatory Care Costs in the Bedford Stuyvesant/Crown Heights Demonstration Project," *The Journal of Ambulatory Care Management*, Vol. 7, pp. 24-39, February 1984.
- 1983 Lee, A.J., H. Birnbaum and C. Bishop, "How Do Nursing Homes Behave: A Multi-Equation Model of Nursing Home Behavior," *Social Science and Medicine*, Vol. 17, No. 23, pp. 1897-1906, 1983.
- 1982 Birnbaum, H., A.J. Lee, *et al.*, *Public Price-Setting in the Nursing Home Industry*, Cambridge, Massachusetts: Abt Books, 1982.
- 1983 Lee, A.J. and H. Birnbaum, "The Determinants of Nursing Home Operating Costs in New York State," *Health Services Research*, Vol. 18, No. 2, pp. 285-308, Summer 1983, Part II.
- 1983 Lee, A.J., D. Hefner, *et al.*, "Evaluation of the Maximum Allowable Cost Program," *Health Care Financing Review*, Vol. 4, No. 3, pp. 71-82, March 1983.
- 1981 Birnbaum, H., C. Bishop, A.J. Lee and G.A. Jensen, "Why Do Nursing Home Costs Vary? The Determinants of Nursing Home Costs," *Medical Care*, Vol. 19, No. 11, pp. 1095-1107, November 1981.
- 1979 Lee, A.J., *Employment, Unemployment and Health Insurance: Behavioral and Descriptive Analyses of Health Insurance Loss Due to Unemployment*, Cambridge, Massachusetts: Abt Books, 1979.
- 1979 Lee, A.J. and G.A. Jensen, "Prospective Reimbursement in Minnesota," *Topics in Health Care Financing*, Vol. 6, pp. 81-86, Fall 1979.
- 1979 Hamilton, D., A.J. Lee and R. Weinstein, "Prospective Payment in Washington State," *Topics in Health Care Financing*, Vol. 6, pp. 117-126, Fall 1979.
- 1978 Lee, A.J. and B.A. Weisbrod, "Public Interest Law Activities in Education", in Weisbrod, *et al.*, (eds.), *Public Interest Law: An Economic and Institutional Analysis*, Berkeley, California: University of California Press, pp. 313-348, 1978.
- 1977 Lee, A.J. and B.A. Weisbrod, "Collective Goods and the Voluntary Sector: The Case of the Hospital Industry," in Weisbrod, ed., *The Voluntary Non-Profit Sector: An Economic Analysis*, Lexington Massachusetts: D.C. Heath and Company, pp. 77-100, 1977.

- 1977 Lee, A.J. and B.A. Weisbrod, "Public Interest Law Activity and the Litigation of School Finance –An Appraisal of the Equity and Efficiency Consequences," *Proceedings of the National Tax Association*, Columbus, Ohio, National Tax Association, pp. 70-78, 1977.

Other Publications (selective)

- 2000 Lee, A.J. and A.M. Lee, *Direct-To-Consumer Advertising: Changing the Face of Pharmaceutical Marketing*, Concord, Massachusetts: MORPACE Pharma/Scrip Reports, March 2000.
- 2000 Lee, A. J. and A.M. Lee, *Leveraging Pharmacoeconomics in Pharmaceutical Marketing*, Waltham, Massachusetts: Decision Resources, Inc., December 2000.
- 1997 A.J. Lee, N.T. McCall, C.F. Liu, R. Freitas, B. Hart, L. Kirsch and R. Goldstein, *An Investigation Into the Effects of the New Hampshire Health Insurance Reform Law, RSA 420-G*, New Hampshire Department of Insurance, December 1997.
- 1995 Lee, A.J., J.H. Huber and W.B. Stason, "Health Policy" and "A Multivariate Analysis of Practice Variation in Post-Stroke Rehabilitation of Medicare Patients" in GE Gresham, *et al.*, *Post-Stroke Rehabilitation Guidelines Report*, Rockville, Maryland: Agency for Health Care Policy and Research, 1995.
- 1995 Lee, A.M. and A.J. Lee, *The Marketing of Pharmaceuticals to Managed Care*, Waltham, Massachusetts: Decision Resources, Inc., March 1995.
- 1983 Bentkover, J. and A.J. Lee, "Projection of Physician Supply and Demand in Ontario to the Year 2001," in *Medical Manpower for Ontario*, Toronto: The Ontario Council of Health, 1983.
- 1990 Lee, A.J., G.S. Goldstein and P.B. Rodman, *The Outlook for the U.S. Managed Care Industry*, Burlington, Massachusetts: Decision Resources, Inc., February 1990.
- 1986 Lee, A.J., *A Considered Assessment of the HMO Development Outlook*, Cambridge, Massachusetts: Arthur D. Little, Inc., 1986.

Honors and Awards

Summa Cum Laude, 1970

Phi Beta Kappa, 1969

Employment, Unemployment and Health Insurance selected as one of the outstanding books in industrial relations and labor economics for 1979 by the Industrial Relations Section of Princeton University.