

# Study of Sugar-Sweetened Beverage Tax Impact and Evaluation of Programs and Services

## **Proposal**

August 11, 2020

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## **Submitted to:**

Sugar-Sweetened Beverage Tax Fund Program  
City of Oakland  
150 Frank Ogawa Plaza, 7th floor  
Oakland, CA 94612  
Attention: Sharon Robinson, Program Planner, Human Services Department

## **Submitted by:**

Mathematica  
505 14th Street, Suite 800  
Oakland, CA 94612-1475  
Phone: (510) 830-3700  
Fax: (510) 830-3701

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Erin Fries Taylor  
*Senior Vice President*

**August 11, 2020**

Sharon Robinson  
Program Planner, Human Services Department  
City of Oakland  
150 Frank Ogawa Plaza  
Oakland, CA 94612

**RE: Study of Sugar-Sweetened Beverage Tax Impact and Evaluation of Programs and Services**

Dear Sharon Robinson:

As part of the 2016 Sugar Sweetened Beverage (SSB) tax ordinance, the SSB Community Advisory Board was established to advise the City of Oakland on the expenditure of revenues generated by the tax. The Community Advisory Board is committed to studying efforts related to the goal of reducing the consumption of SSBs and associated health effects. To that end, Mathematica is proposing to conduct an evaluation of the programs and services funded by the tax and describe trends in SSB consumption. As requested, we are submitting a proposed scope of work and budget via email.

To provide the City of Oakland with a thorough understanding the programs and services funded by Measure HH, Mathematica will draw on its work studying portfolios of community-based interventions, in Oakland and other municipalities. Our proposed team consists largely of staff in our Oakland, California office, helping to ensure a deep understanding of local stakeholders and community concerns, as well as those with deep experience examining the impact of SSB taxes.

We look forward to working with you on this important project. If you have any questions regarding our submission, please email [rfpcenter@mathematica-mpr.com](mailto:rfpcenter@mathematica-mpr.com) or, if you need to speak to someone directly, call Pamela Tapscott, Mathematica's vice president of contract operations, at (202) 484-3294.

Sincerely,



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## I. INTRODUCTION

Consumption of sugar-sweetened beverages (SSBs) has increased in recent decades, with SSBs now contributing more than 10 percent of children’s energy intake (Wang, Bleich, and Gortmaker 2008). The rise in SSB consumption coincides with the rise in childhood and adult obesity (Putnam and Allshouse 1999; Ogden et al. 2006); Tate et al. (2012) demonstrated that soft drink consumption causes weight gain. SSBs do not invoke feelings of satiety because fructose, an ingredient common in SSBs, can block the leptin-signaling pathway, leading to additional food consumption (Stanhope and Havel 2008). Calories from SSBs are extra calories that do not provide nutritional value, and these small increases in calories over time can lead to large increases in weight (Hill et al. 2003). In addition, soft drink, SSB, and fructose consumption have been linked to poor dental health, gout, type 2 diabetes, hypocalcemia, and poor sleeping habits (Vartanian, Schwartz, and Brownell 2007; Choi, Willett, and Curhan 2010). As a result of the negative health consequences of SSB consumption, some policymakers in the United States proposed taxes on SSBs to reduce consumption and improve population health. SSB taxes have been recently implemented by several U.S. cities, including **Oakland, California (2017)**; Berkeley, California (2015); Albany, California (2017); Boulder, Colorado (2017); Cook County, Illinois (August-December 2017); Philadelphia, Pennsylvania (2017); San Francisco, California (2018); and Seattle, Washington (2018).

The Human Services Department (HSD) of the City of Oakland seeks a partner to study the SSB tax’s impact and evaluate programs and services funded through the Reducing Consumption of SSB Community Grants Program. These are two separate but complementary goals, because the tax and the grants awarded from the SSB Tax Fund (Measure HH) have the common aim of promoting the health of Oakland residents, particularly in neighborhoods and among populations disproportionately affected by obesity and associated chronic diseases. Target neighborhoods include parts of West Oakland, East Oakland, San Antonio, and Fruitvale. Priority populations include children and families; pregnant women; households with limited resources; those targeted by the SSB industry; and groups with risk factors for diabetes, obesity, and tooth decay. Given the current priorities of the City of Oakland, this proposal describes our approach for evaluating programs and services in the first two grant cycles, as well as assessing trends in SSB consumption as they relate to implementation of the tax and implementation of programs and services.

## II. SCOPE OF WORK

The City of Oakland seeks a partner to conceptualize and implement an evaluation plan for a diverse set of investments in programs and services, and one-time projects aimed at promoting healthy food choices and physical activity and reducing consumption of sugar-sweetened beverages. This section describes our approach to meeting the short-term goals of providing accountability of the investments in programs and services currently funded. It then describes plans for assessing trends in SSB consumption following the tax and these investments.

### A. Assessing the accountability of early investments

The first set of 13 grantees (Round 1) received funding from Measure HH funds for the period from July 1, 2019, to June 30, 2020. The grant period for the second set of 13 grantees (Round 2) runs from October 1, 2019, to December 31, 2020. We propose in the first five months of the evaluation contract to conduct an assessment of what the grantees planned to conduct and accomplish and compare this with available information about the programs and services they offered and the people they served. In addition to reviewing the documents that grantees provided the City of Oakland, we propose interviewing up to four individuals who can speak about the program services, including managers and front-line staff conducting the work about implementation challenges, successes, and opportunities, including the effects of COVID-19. Assuming that these interviews occur while social distancing guidelines are still in place, we plan to conduct these via conference call. We will also explore whether grantees see opportunities for evaluation and inquire about any program evaluation data they collect on their own beyond what their grant requires.

We will aggregate information across grantees, if data permits. For example, we might examine the target areas served by each grantee and show the combined investments in a geographic area.

Exhibit II.1 shows the research questions addressed in each round.

**Exhibit II.1 Investment assessment research questions and data sources**

Research questions	Application	Data sources		
		Statement of work	Quarterly reports	Staff interviews
1. What did each grantee accomplish? a. How does this compare with programs and services the grantee planned to carry out?	✓	✓	✓	
2. Who did the grantee serve? a. How does this compare with the participants the grantee set out to serve?	✓	✓	✓	
3. What are the implementation successes, challenges, and opportunities? a. How can the City of Oakland support grantees' success?	✓	✓	✓	✓
4. What are the target areas served by grantees? a. What level of investment has the City of Oakland made in these areas with Measure HH funds?	✓	✓	✓	

Four entities also received funding to support a diverse set of health-promotion activities, such as capital improvements to playground and sports facilities as well as fitness programs delivered by the Oakland Parks, Recreation, and Youth Development department. Because we anticipate that the range and scope of these activities is broader than that of the grantee programs and services, we propose to adapt the interview protocols for managers and staff from these entities to better reflect their activities. We will also customize summaries for these entities to reflect their service area and activities. For example, an entity might be engaged in a variety of funded activities serving different areas within Oakland. If data are available, we could map the locations where services are offered, or where capital improvements were made, together with the priority neighborhoods for community grants or other available demographic data to visualize the intended service area of those improvements.

### **1. Products and dissemination of results**

For each grantee or entity, we will create a visually attractive and easy to understand 1 to 2 page summary of what each has performed and accomplished. The City of Oakland can use these to understand who is being served by each agency and as a way to better assess future grant funding. We will distill information from each grantee's application, statement of work, budget, quarterly reports, and insights from the qualitative data collection. We will present the data across grantees in a similar manner, using infographics to visually convey the types of programs and services offered and reach of those investments.

### **2. Data**

One key source for documenting the progress of the portfolio of programs and services and at the level of the individual grantees is the data reported by grantees. In our experience, we have found training grantee staff to be a critical component of accurate and timely reporting. Together with the grantee summaries, we will include best practices that the City of Oakland can use to help grantees better prepare to provide timely and standardized data in the future.

## **B. Assessing trends in SSB consumption**

The City of Oakland is also interested in using existing data sources to examine the effects of the SSB tax and Measure HH fund investments on consumption of SSBs and alternative beverages, and the potential impact of programs and services on the overall promotion of nutrition and physical activity in Oakland. Specifically, the City of Oakland is interested in the impacts of the tax and fund investments within target communities with the highest rates of obesity, diabetes, and related chronic diseases. Given the wide array of investments in programs and services and the behaviors and outcomes they aim to affect, and limited secondary data availability, thoughtful planning will be necessary to determine what is feasible and ensure that any analysis is providing meaningful evidence regarding the contributions of the community interventions. Thus, we propose to begin by working with the City of Oakland to develop a conceptual framework that will help organize the grantees and intended outcomes, describe trends in citywide SSB consumption among Oakland Unified (OUSD) middle and high school students, and explore the feasibility of using data sources available to the City of Oakland to assess more detailed patterns in consumption.

### **1. Develop conceptual framework**

The first step will be developing a conceptual framework to ensure that any future evaluation design aligns with the activities included in the City of Oakland's investments. This framework will also



guide decisions about what types of analyses would be appropriate to consider for assessing the effects of the programs and services.

Starting with the assessment of Round 1 and Round 2 grantees and other funded entities, we will grow our understanding of the types of programs and services that grantees are implementing, and the types of outcomes they hope to achieve. These will help us develop a foundation for the conceptual model. For example, during the staff interviews, we can ask about outcomes that grantees are trying to achieve and how they might be collecting data related to these outcomes. We will also meet with the City of Oakland to discuss what lessons we can learn from the first year of investments and the direction of future investments. In this way, we can build a framework that reflects the ongoing and future priorities of the City of Oakland's investments.

## **2. Assess trends in consumption of SSBs after implementing the tax**

Mathematica will first conduct a descriptive pre-post analysis to determine whether consumption of SSBs has decreased among Oakland Unified (OUSD) middle and high school students, relative to the time period prior to the tax. This analysis will use California Healthy Kids Survey data on Oakland Unified students' responses to the following questions during school years 2016-17 through 2018-19: "During the past 24 hours, how many times did you drink a glass or can of sweetened soda (like Coke or Pepsi), a sports drink, or other sweetened soft drink (like Snapple)?" We note that consumption of SSBs might have changed in Oakland because of the tax, the grant programs, and a myriad of other factors. The results of this pre-post analysis cannot disentangle the extent to which any of these influenced changes in SSB consumption and should therefore not be interpreted as describing a causal relationship between Oakland's SSB tax and SSB consumption.

Based on the information gained from grantees, we can also determine whether programs and services were expected to affect SSB consumption for certain schools, and examine patterns of SSB consumption in those schools. For example, if funded projects were developing youth leaders and health advocates in some schools, we can compare SSB consumption for that subset of schools to schools that did not have projects where youth were promoting water.

Secondly, Mathematica will work with the City of Oakland to explore how data on SSB tax revenue can be analyzed to understand how SSB consumption in Oakland has changed over time. Because the SSB tax is levied on distributors of SSBs based on the volume of SSBs distributed, we can utilize snapshots of the amounts of SSB tax revenue collected over time to back out the quantity of SSBs distributed in Oakland during each of those periods. We will also work with the City of Oakland to determine whether any such data collected before or around the time the tax was enacted can be used as a baseline measure of consumer demand for SSBs prior to the tax.

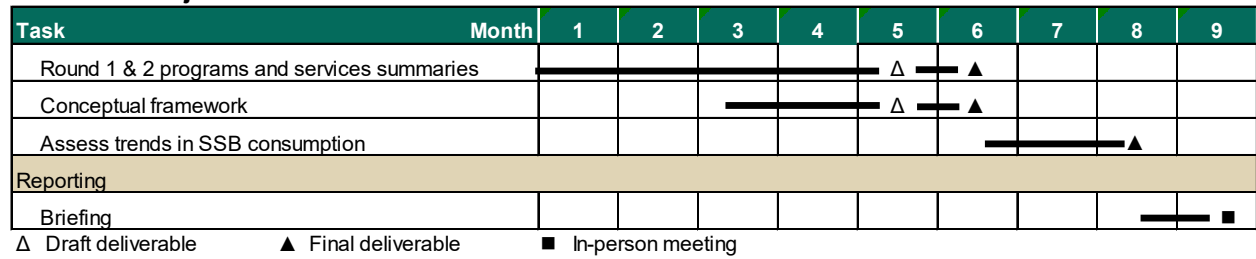
## **3. Products and dissemination**

The final product of this phase will be a conceptual model that describes the pathways by which programs and services are expected to impact community health, and a descriptive assessment of changes in SSB consumption in Oakland since the implementation of the tax. We will deliver a progress briefing to stakeholders on the conceptual model, descriptive assessment, and grantee summaries. If an impact analysis is warranted, based on the results of this phase and the introduction of appropriate data, our team can provide a workplan and budget to conduct this evaluation.

### C. Timeline

The proposed timeline for the evaluation of programs and services is shown in Exhibit II.2.

**Exhibit II.2. Project Gantt chart**



### III. STAFFING

We assembled a talented and diverse team that can meet the needs of the evaluation of programs and services. Our team has a deep understanding of community health improvement, strong technical skills for designing and carrying out impact studies and evaluating program implementation, and a collaborative approach for engaging stakeholders and grantees in evaluation work. The team, based in our Oakland, California office, has in-depth experience evaluating portfolios of programs and services and working with clients to develop evaluation plans that resonate with their needs and the needs of program stakeholders. In this section, we summarize our staffing model (Exhibit III.1) and proposed team’s qualifications.

**Exhibit III.1. Our staffing model**



\* Staff member works in Mathematica’s Oakland office.

#### A. Leadership

**Mindy Hu** (M.P.H., Social Science Research, Mailman School of Public Health, Columbia University), a survey researcher and registered dietitian, will lead the evaluation of programs and services and leverage the appropriate staffing and skills to achieve the goals of the project. She has more than 10 years of experience designing evaluations and collecting data for projects focusing on nutrition, physical activity, and community health. As the deputy survey director of the Multi-City Sugar-Sweetened Beverage Tax Evaluation for the Robert Wood Johnson Foundation, Ms. Hu developed procedures for in-person data collection and trained staff to collect store observation and shopper intercept survey data; these data laid the foundation for some of the analyses of tax impact in those communities. Ms. Hu currently oversees a complex data collection for the School Nutrition and Meal Cost Study-II, which examines the school food environment, students’ dietary intake, and parents’ and students’ satisfaction with school meals. In this role, she successfully manages multiple teams that prepare schools for data collection, observe school foods, and interview students and their parents. In addition, she has led site visits and interviews for strategy-level evaluations for Oakland Unite, the HSD’s violence prevention initiative.

#### B. Task leads

**Lisa Schottenfeld** (M.P.H., Health Policy and Management, Boston University), a researcher, will oversee the analyses of qualitative data collected during interviews and lead the conceptual model for

the evaluation of programs and services. She brings experience designing and implementing evaluations of complex portfolios of grants intended to promote health and health equity. She also has extensive experience working with community-based programs to collect and analyze qualitative data on program implementation and outcomes. For example, she partnered with the Colorado Health Foundation to design and implement an evaluation of their grants to small, community-based organizations promoting well-being and equity among young Coloradans. Similarly, on a project for the Robert Wood Johnson Foundation, she designed an evaluation of a portfolio of grants to promote policy and health systems changes. On other projects, she has designed and led qualitative data collection and analysis of community-based efforts to promote physical activity among young people and address the social determinants of health.

**Dallas Dotter** (Ph.D., Economics, University of California, San Diego), a researcher, will oversee the assessment of trends in SSB consumption. He specializes in causal inference using experimental and quasi-experimental methods to study the impacts of interventions and policies. Dr. Dotter currently leads several impact evaluation studies, including (1) a quasi-experimental study on the impacts of citywide school governance reforms on students' achievement in Washington, DC, and (2) a congressionally mandated randomized controlled trial across 10 states assessing the impacts of innovative strategies for increasing employment and earnings among participants of the Supplemental Nutrition Assistance Program. He also leads the production of interactive tools for stakeholders to extract decision-enhancing information from multiple citywide data sources using predictive analytics, similar to the dashboard proposed for the study of SSB tax impact.

### **C. Subject matter expertise and quality assurance**

**Dave Jones** (Ph.D., Economics, University of North Carolina at Chapel Hill), an associate director in Mathematica's Health unit, will serve as a subject matter expert for the assessment of trends in SSB consumption. Dr. Jones has designed and led evaluations using a multitude of methods and complex data sources to answer a variety of health policy questions. He was recently a principal investigator for the Multi-City Sugar-Sweetened Beverage Tax Evaluation for the Robert Wood Johnson Foundation. The study featured an analysis of the Oakland SSB tax and its effects one year after implementation. He led an evaluation of excise taxes on tobacco prices and marketing in Massachusetts, including primary data collection at retailers and estimation of differential effects on low-income and minority populations, as well as by brand, store type, and proximity to the state border. He co-led a study of emergency food program locations in relation to the retail food environment, high-risk populations, and food security. Dr. Jones also led a spatial analysis of the effects of investments in prevention of childhood lead poisoning in Chicago.

**Dana Petersen** (Ph.D., Health Services and Policy Analysis, University of California, Berkeley), a senior researcher, will serve as the overall quality assurance reviewer. In this role, she will review and comment on all products (including work plans, grantee summaries, and written and interactive program deliverables) to ensure that they meet Mathematica's standard of excellence and satisfy the City of Oakland's and other program stakeholders' needs. She has more than 20 years of experience in planning, managing, and evaluating public health, health care, and social service programs and policies focusing on diverse low-income populations. She is recognized for her expertise in research design, data collection, and analysis. Dr. Petersen currently co-directs the Comprehensive Primary Care Plus implementation study for the Centers for Medicare & Medicaid Services, a multimethod study of efforts to improve the quality and cost of primary health care that is collecting and analyzing data in nearly 3,000 sites across the nation. She recently completed a study of business

owners' experiences implementing an SSB tax in Philadelphia and Oakland as part of the Multi-City Sugar-Sweetened Beverage Tax Evaluation for the Robert Wood Johnson Foundation. Dr. Petersen also led a qualitative study of stakeholder and family perspectives on opportunities and barriers to children's participation in physical activity for the Colorado Health Foundation and an assessment of the Action Plan to Reduce Racial and Ethnic Health Disparities, an initiative of the U.S. Department of Health and Human Services.

## D. Support

**Michela Garber** (B.A., Sociology and Media Studies, University of California, Berkeley), a survey research associate, will help conduct interviews for the evaluation of programs and services and analyze data from these activities. She has led semi-structured interviews and provided logistical support for focus groups with participants and stakeholders for Mathematica's evaluation of Oakland Unite. She has experience recruiting organizations to participate in evaluation activities for a nationwide study on school meal costs and nutrition, interviewing people about program costs, soliciting feedback from stakeholders in developing survey instruments, and facilitating data collector training.

**Tori Ehrhardt** (B.S. Psychology; B.A. Biology, University of North Carolina at Chapel Hill), a survey research associate, will help conduct interviews for the evaluation of programs and services and analyze data from these activities. She has experience recruiting organizations for evaluations of early childhood education and school meals. She has also led interviews with stakeholders to collect qualitative feedback on the data collection process for the School Meals Operations study. This led to changes in survey instruments to reduce the administrative burden for all study participants.

## IV. COST PROPOSAL

### A. Introduction

This revised cost proposal, submitted by Mathematica, contains our budget by task and other business materials for conducting the project titled *Study of Sugar-Sweetened Beverage Tax Impact and Evaluation of Programs and Services* in response to the request issued by the City of Oakland, Department of Human Services. The budget is \$249,201. It provides the number of budgeted hours for individuals and categories of labor and the price of materials and supplies to perform the proposed work. The fixed unit prices used to estimate costs are based on prices set each calendar year. Our budget assumes a start date of September 20, 2020 with a 9-month period of performance. We also assume that we will be reimbursed based on fixed unit pricing. This bid is firm for a period of 60 days from the date of submission.

Please address any questions relating to this proposal to:

Pamela L. Tapscott  
Vice President  
(202) 484-3294  
email: [rfpcenter@mathematica-mpr.com](mailto:rfpcenter@mathematica-mpr.com)

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email: [rfpcenter@mathematica-mpr.com](mailto:rfpcenter@mathematica-mpr.com)

Sending procurement-related emails to our central email address assures proper receipt and distribution of these materials. Please use this email address for all Mathematica locations; we will check it daily for new messages.

Part B of this section contains complete budget data for the proposal. Part C provides the budget narrative.

## B. Budget

### Exhibit IV.1. Program evaluation

	Rate	Assessing the Accountability	Impact Evaluability	Total hours	Total dollars
<b>GENERAL LABOR (Depts. 20,24-25,29,40-41,44,46-49)</b>					
<b>Subject Matter Expert III</b>					
David Jones	\$286.87	0	8	8	\$2,295
<b>Subject Matter Expert II</b>					
Dana Petersen	\$226.54	18	0	18	\$4,078
<b>Subject Matter Expert I</b>					
Lisa Schottenfeld	\$188.37	227	0	227	\$42,760
<b>Human Services Subject Matter Expert I</b>					
Dallas Dotter	\$188.37	0	84	84	\$15,823
<b>Lead Program Analyst</b>					
Esa Eslami	\$180.56	146	0	146	\$26,362
<b>Survey Methodologist I</b>					
Mindy Hu	\$179.43	310	0	310	\$55,623
<b>Analyst I</b>					
Health Analyst	\$110.80	339	48	387	\$42,878
<b>Programmer</b>					
Programmer	\$91.14	264	0	264	\$24,061
<b>Survey Associate</b>					
Michela Garber	\$83.02	202	0	202	\$16,769
Tori Ehrhardt	\$83.02	170	0	170	\$14,113
<b>Editor</b>					
Editor	\$128.47	16	0	16	\$2,056
<b>Administrative Production</b>					
Administrative Production	\$119.19	20	0	20	\$2,384
<b>SUBTOTAL - LOADED LABOR</b>		<b>\$225,765</b>	<b>\$23,436</b>		<b>\$249,201</b>
<b>TOTAL COMPENSATION</b>		<b>\$225,765</b>	<b>\$23,436</b>		<b>\$249,201</b>

## C. Budget Narrative

### 1. Starting Date

We calculated costs assuming a September 20, 2020 starting date, and a total contract period of 9 months.

## 2. Direct Labor

We have budgeted the number of hours for individuals and categories of labor estimated to perform the proposed work. We based the fixed unit prices used to estimate costs on prices set each calendar year. We have prepared our budget estimate using fully aggregated unit pricing.

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# Appendix A: Resumes

Proposed staff are listed below in the order in which their resumes appear in this appendix.

<b>Leadership</b>
Mindy Hu
<b>Task leads</b>
Lisa Schottenfeld
Dallas Dotter
<b>Subject matter expertise and quality assurance</b>
Dave Jones
Dana Petersen
<b>Support</b>
Michela Garber
Tori Ehrhardt

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## Leadership

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## Mindy Hu

Survey Researcher

### Experience

#### Mathematica

##### Nutrition and Physical Activity

##### **Survey Director, Making the Supplemental Nutrition Assistance Program (SNAP) Easy for Seniors (2019-).**

Manage all aspects of respondent outreach, interviewer training, and data collection for follow-up computer-assisted telephone interviews (CATI) of older adults who applied for SNAP under the Elderly Simplified Application Process. The study will examine changes in food security after applying for SNAP through Elderly Simplified Application Process.

##### **Deputy Survey Director, School Nutrition and Meal Cost Study-II (SNMCS-II) (2018-).**

Oversee instrument development, data collection coordination, and planning for a complex set of data collection activities with school food authorities, schools, parents, and students, including observational, computer-assisted personal interviewing; CATI; and web instruments. Coordinate with task leads to ensure instruments address multiple study objectives and research questions. Oversee development of Office of Management and Budget (OMB) package and interviewer training manuals and materials. SNMCS-II will examine the nutritional quality and cost of school meals, food service operations, student participation and satisfaction with school meals, and students' diets.

##### **Deputy Survey Director, Multi-City Sugar-Sweetened Beverage Tax Evaluation (2016-2018).**

Developed and implemented field procedures to collect in-person store observation and shopper intercept survey data. Monitored data collection progress for field data collection and subsequent web or phone household survey with eligible shoppers. The evaluation examines the impact of sugar-sweetened beverage taxes on purchases and consumption in two U.S. markets.

##### **Institutional Review Board (IRB) and Office of Management and Budget Task Leader, Evaluation of Demonstrations to End Childhood Hunger (EDECH) (2015-2018).**

Strategized to improve survey response rates among households selected for the evaluation and monitor data collection progress. Provided weekly data collection updates to client. Coordinated with task leads to identify and recruit participants for focus groups and in-depth interviews. Contributed to telephone interview and field locator training manuals for CATI household surveys. Coordinated with task leads across divisions to deliver training materials for multiple data collection components. Drafted responses to OMB on survey data collection. Coordinated with task leads across divisions to prepare OMB package and address client comments. Managed revisions for IRB approval. EDECH assesses the impact of innovative strategies to end childhood hunger on household food security, and examines the implementation of these projects.

**Field Task Leader, Outcomes Evaluation of Older Americans Act (OAA) Title III-C Elderly Nutrition Services Program (2015-2016).** Created and implemented efficient field processes and monitored data collection progress. Trained study coordinators to recruit local service providers for the evaluation.

### Education

**2006** M.P.H., Social Science Research, Mailman School of Public Health, Columbia University

**2002** Certification, Registered Dietitian

**2001** B.S., Nutrition, magna cum laude, Cornell University

### Positions

**2007-** Mathematica

**2013-** Survey Researcher

**2007-2013** Survey Specialist

**2005-2007** New York City Department of Health and Mental Hygiene

**2006-2007** Consultant, Bureau of Chronic Disease Prevention

**2005-2006** Intern, Health Research Training Program

**2002-2004** Clinical Dietitian, Englewood Hospital and Medical Center

**2001-2002** Dietetic Intern, Yale-New Haven Hospital

Trained field interviewers to conduct 24-hour dietary recall and outcomes interviews. Trained telephone interviewers to conduct menu survey with local service provider staff. Drafted memo for client and OMB on pilot study findings, which included the menu survey and client outcomes interview with 24-hour dietary recall. The outcomes evaluation will examine the impact of the OAA Title III-C Program on the health outcomes of congregate and home-delivered meal participants, as compared to a matched sample of nonparticipants.

**Data Collection Task Leader, Evaluation of the Pilot Project for Canned, Frozen, or Dried Fruits and Vegetables in the Fresh Fruit and Vegetable Program (FFVP-CFD) (2014-2015).** Trained interviewers, monitored data collection progress, and ensured data quality. Drafted study protocol and oversaw IRB submission. Revised instruments and recruitment materials and developed training materials. The evaluation examines the impacts and implementation of the FFVP-CFD pilot project in participating schools.

**Survey Researcher, Process Evaluation of Older Americans Act Title III-C Elderly Nutrition Services Program (2012-2015).** Developed recruitment training materials and trained recruiters. Oversaw testing of web-based instruments and data file preparation for the process evaluation, which examined the strategies, activities, and resources of the OAA Title III-C Program at each level of the Aging Network—State Unit on Aging, Area Agency on Aging, and Local Service Provider.

**Questionnaire Design Task Leader, Child Population Health Survey, Health Care Survey of U.S. Department of Defense (DoD) Beneficiaries (HCSDB) (2012-2013).** Developed self-administered questionnaire for the Child Population Health Survey of DoD beneficiaries about their child's health, including physical activity and dietary behaviors. Drafted supplemental questions and contact materials for the adult HCSDB, used to evaluate military health care services. The child survey, fielded annually, provides information about health topics of interest to military health system leadership.

**Survey Specialist, Evaluation of Older Americans Act Title III-C Elderly Nutrition Services Program (2010-2012).** Developed and tested data collection instruments and recruitment materials for State Units on Aging, Area Agencies on Aging, Local Service Providers, and nutrition services program clients and program nonparticipants. This project established the evaluation design and instruments to assess how efficiently and effectively the OAA Title III-C Program addresses the program goal of helping to keep older Americans healthy and active in their homes and communities.

**Survey Specialist, Randomized Experiment of Playworks: Student and School Outcomes (2010-2011).** Managed background checks and fingerprinting of project staff to ensure they met requirements of participating school districts. Conducted data collection for the evaluation, including student surveys and recess observations. Coordinated with schools to gather consents and plan for data collection visits. Recruited schools in person to participate in evaluation. This study examines the implementation and impact of the Playworks program, a physical activity program that places full-time coaches in low-income elementary schools to organize activities during recess and other periods throughout the school day.

**Survey Specialist, School Nutrition Dietary Assessment Study-IV (SNDA-IV) (2009-2010).** Recruited school districts to participate in the study. Provided technical assistance to other staff involved in recruitment effort. Coordinated with developer to refine database for centrally collecting school data and reporting on recruitment status. SNDA-IV will provide up-to-date information about the food and nutrient content of meals offered and served in the National School Lunch Program and the School Breakfast Program.

**Survey Specialist, Hunger in America 2009 (2009).** Provided technical assistance to numerous local food banks, which were responsible for collecting data from their own member agencies. This project provided estimates of the people and households who use emergency food providers in the Feeding America network.

**Survey Specialist, Interactions Between the Food Stamp Program and the Economy (2008).** Interviewed authorities in state government and community organizations for their perspective on food stamp caseload changes. This project examines the relationship between the economy and other factors with current SNAP caseload trends.

## Health

**Survey Director, Data Across Sectors for Health 2.0 Evaluation (2019-).** Oversee instrument development and data collection for a web-based network survey of organizations involved in a peer-learning network and organizations involved in cross-sector data-sharing collaboratives. The evaluation will assess connections across organizations in the peer-learning network and within individual data-sharing collaboratives.

**Survey Researcher, Learning Systems for Accountable Care Organizations (ACOs) (2014).** Developed focus group protocol and conducted web-mediated focus groups to learn about Pioneer ACO operations and practices. Developed needs assessment tool to help potential applicants to the comprehensive end-stage renal disease care initiative assess readiness for the model. The Learning Systems for ACOs project will create a structure for training and peer-to-peer learning to help Medicare ACOs achieve better care for patients, better health for populations, and lower health care costs.

**Survey Director, Autoworker Health Care Survey (AHCS) (2012-2013).** Oversaw all aspects of mail survey of 13,000 autoworkers and their spouses, including IRB approval, mailing and receipting procedures, telephone reminder calls, and vendor agreements. The goals of the AHCS are to identify modifiable aspects of primary health care systems that contribute to patient experiences with the delivery system and subsequently affect quality and costs of care and to examine the importance of patient engagement with the health system and identify ways to increase the likelihood for optimal engagement.

**Survey Specialist, Research Evaluation and Impact Assessment of the American Reinvestment and Recovery Act of 2009 (ARRA) Comparative Effectiveness Research (CER) Portfolio (2011-2013).** Conducted and analyzed in-depth interviews with principal investigators/project directors and project officers regarding their ARRA-funded CER projects. Conducted case study of collaborations on an exemplar project. Drafted focus group protocols for public perceptions about CER and principal investigator perspectives about engaging patients in CER design. This evaluation of the ARRA CER portfolio will identify existing and future gaps and barriers to achieving long-term CER goals, develop metrics needed to assess long-term impacts, and provide immediate feedback on short-term CER portfolio effects.

**Survey Specialist, Autoworker Health Care Survey Pilot Study (2010-2011).** Coordinated with developer to customize the Sample Management System. Pre-tested contacting materials and consent procedures with autoworkers. Developed mailing procedures and training tools and trained staff on a complex hard copy questionnaire mailing.

**Survey Specialist, Evaluation of the Electronic Health Records Demonstration (EHRD) (2008-2011).** Assisted in developing, testing, and fielding web surveys for the Medicare Care Management Performance Demonstration and EHRD. Drafted sections for the OMB package. These projects will evaluate the effectiveness of the demonstrations on promoting quality care through physician adoption of health information technology.

## Education

**Respondent Outreach Task Leader, Maternal and Infant Home Visiting Program Evaluation (2018-).** Oversee respondent outreach to mothers and teachers of children participating in the evaluation to collect data for a parent and caregiver CATI survey, in-home assessment, and web-based teacher survey. This study uses a random assignment design and collects data longitudinally from about 5,000 children across 12 states whose mothers were interested in enrolling in home-visiting services around the time of the child's birth. The evaluation will estimate the effects of home visiting on birth outcomes; infant health and development; and prenatal, maternal, and infant health care use.

**Survey Director, Evaluation of the Early Learning Mathematics Initiative (2014).** Directed data collection for an impact and outcome evaluation, including student assessments, classroom observations, and teacher interviews. This evaluation will assess impacts of the initiative on student achievement and teacher progress in mathematics instruction and use of formative assessments, using a quasi-experimental matched-comparison group design.

**Parent Survey Task Leader, National Longitudinal Transition Study (2013).** Developed materials to train field interviewers on conducting the web-based parent survey. Monitored productivity and managed day-to-day data collection activities. This study focuses on the education and transition experiences of youth between the ages of 13 and 23 from student to adult life.

**Survey Operations Center (SOC) Supervisor, National Longitudinal Transition Study (2012).** Helped launch and supervise Oakland's SOC, one of three Mathematica sites interviewing 12,000 parents and students using CATI. Coordinated with staff across offices to ensure operations met project needs and manage issues related to performance of on-call staff. This study focuses on the education and transition experiences of youth between the ages of 13 and 23.

**Recruitment Task Leader, Universal Preschool Child Outcomes Study—Phase 5 (2011-2012).** Oversaw recruitment and coordination of consent gathering and child assessments at 40 Los Angeles Universal Preschool (LAUP) programs. This study will examine how LAUP programs can continue to improve services for children and develop their school readiness skills.

**Survey Specialist, Evaluation of the Teach For America (TFA) Investing in Innovation Scale-Up (2011).** Recruited TFA placement partners and schools to participate in the evaluation. This study will provide information about the effectiveness of TFA elementary school teachers on math and reading achievement of students in prekindergarten through grade 5.

**Survey Specialist, Early Head Start (EHS) Family and Child Experiences Survey (2007-2010).** Developed and pre-tested data collection instruments, created training materials for interviewers, and recruited programs to participate in the survey. Reviewed measures for data collection plan. Composed applications for IRB approval and a Certificate of Confidentiality. Provided ongoing technical assistance support and coordination with programs to collect data on participating families. This national study of EHS programs will examine child development, family outcomes, program implementation, and service quality. This project is sponsored by the U.S. Department of Health and Human Services, Office of Planning, Research and Evaluation.

### **Violence Prevention**

**Primary Data Collection Task Leader, Evaluation of Oakland Unite Services (2019-).** Lead site visits and focus groups for evaluation of violence prevention programs serving high-risk youth and young adults, including recruitment, conduct, analysis, reporting, and oversight of staff. The evaluation assesses the implementation and impact of violence prevention strategies on arrests, victimization, and educational outcomes.

### **Labor**

**Survey Director, National Evaluation of the Homeless Veterans Reintegration Program (HVRP) (2018-).** Oversee instrument development, obtain IRB approval, and help prepare OMB package for a survey of grantees administering HVRP. Conducted for the U.S. Department of Labor, the evaluation will examine the impact and implementation of HVRP grants, which provide employment-related services to homeless veterans.

**Survey Director, Outcomes Evaluation of the Technology-Based Learning Grants Demonstration (TBL) (2013).** Directed online satisfaction survey of TBL program participants, including telephone follow-up to boost response rate. The survey was part of the outcomes evaluation of the TBL Initiative, which sought to increase the number of workers with marketable skills by using electronic technology to expand access to training in high-growth, high-demand occupations.

**Survey Specialist (2013), Training Task Leader (2011-2013), Evaluate Outcomes and Impacts of Social Enterprises Run by REDF's Social Innovation Fund Portfolio Organizations (2011-2013).** Developed materials to train grantees on surveying program participants. The survey is part of an outcomes evaluation that will track outcomes for the population of individuals newly employed in social enterprises during the 2012 calendar year. Conducted in-depth interviews and focus groups with organization staff and



program participants for an implementation study. Analyzed qualitative data and drafted program-specific reports of findings.

### **New York City Department of Health and Mental Hygiene; New York, NY**

As **Consultant (2006-2007)** and **Intern (2005-2006)**, developed and implemented plan to train day care and prekindergarten teachers in neighborhoods with high obesity-related health risks in a physical activity curriculum for children. Established relationships with key external customers and community liaisons to implement training goals. Increased the number of training sessions delivered. Created evaluation tools and work plan to assess impact of the initiative. Coordinated collection of training and evaluation data among various internal staff and departments. Analyzed survey data and generated reports to assess the impact of city programs promoting physical activity (particularly those targeting neighborhoods with the highest prevalence of obesity). Improved functionality of the department's internally networked database, allowing for more efficient initiative tracking and report generation. Facilitated migration of database to a web-based server in conjunction with information technology department. Reported on the progress of training initiative to senior management, including bureau head and health commissioner. Managed interns on project to evaluate impact of training initiative.

### **Englewood Hospital and Medical Center; Englewood, NJ**

As **Clinical Dietitian (2002-2004)**, performed nutrition assessments and provided medical nutrition therapy for general medical and surgical patients, with emphasis on cardiac, cardiopulmonary, and cardiac surgery patients. Collaborated with patients and their families/caregivers to develop customized, medically appropriate nutrition modifications in both inpatient and outpatient settings.

### **Yale-New Haven Hospital; New Haven, CT**

As **Dietetic Intern (2001-2002)**, performed nutrition assessment and provided medical nutrition therapy for diverse populations. Developed and participated in community presentations and health fairs promoting health and wellness.

## **Papers and Publications**

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Cornwell, Derek, Mindy Hu, and Dominick Esposito. "Public Perceptions of Comparative Effectiveness Research and Use of Evidence in Healthcare Decision-Making." *Journal of Comparative Effectiveness Research*, vol. 3, no. 6, Special Focus: The ARRA Investments in CER, 2014, pp. 623-634.

## **Information Technology**

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SPSS, Access, Excel, PowerPoint, Word

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## Task leads

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## Lisa Schottenfeld

Researcher

### Selected Experience

#### Mathematica

**Deputy Project Director, Evaluating the Robert Wood Johnson Foundation's (RWJF) State-Focused Portfolio (2019-).** Evaluate a portfolio of grants designed to promote health and health equity through state-based health systems and policy changes. Grants in this portfolio fund targeted technical assistance and leadership development for state government officials and other key stakeholders, along with support to build advocacy capacity. Evaluation methods include grantee and target audience interviews, poll and media tracking, and Twitter analysis. The goal of this project is to understand what types of state-based investments, under which circumstances, are likely to result in policy and systems changes.

**Researcher, Measuring Mindset and Attitude Shifts in State and Community Leaders and Influencers (2019-).** Lead a review of the literature on health equity, the social determinants of health, and community power building for the design of a survey to assess mindset shifts among a diverse set of influencers and how these shifts might affect policy. Insights from this project will guide RWJF's work to influence a broad range of stakeholders to promote health as a shared value.

**Deputy Project Director, Rapid Cycle Evaluation of the Supporting Healthy Teen Minds and Resiliency Funding Opportunity (2018-).** Lead qualitative data collection, analysis, and reporting for the evaluation of the Colorado Health Foundation's grant portfolio designed to promote mental well-being among young people in Colorado, with a particular emphasis on youth of color and those who identify as LGBTQ+. Provide recommendations for integrating an equity lens throughout the evaluation and grantmaking process.

**Task Lead, Evaluating the National Academy of Medicine Culture of Health Program (CoHP) (2018-2019).** Led qualitative data collection and analysis for the evaluation of CoHP's efforts to support communities working to promote health equity and address the social determinants of health. Funded by RWJF, the goal of CoHP was to identify strategies to create and sustain conditions that support equitable good health for all Americans.

**Researcher, Planning a Bundled Evaluation of the Robert Wood Johnson Foundation's Investment in States (2018-2019).** Co-designed an evaluation of a portfolio of projects to improve state health systems through targeted technical assistance, leadership development, and support to build advocacy capacity. This project includes development of an overarching theory of change, conceptual and measurement frameworks, and methodological recommendations.

#### Education

- 2012** M.P.H., Health Policy and Management, Boston University
- 2011** M.S.W., Macro Social Work Practice, Boston University
- 2005** B.A., Religion, Wesleyan University

#### Positions

- 2012-** Mathematica
- 2017-** Researcher
- 2012-2017** Research Analyst
- 2012** Program Coordinator, Partners in Health & Housing Prevention Research Center
- 2010-2012** Boston University School of Social Work
- 2011-2012** Graduate Research Fellow/Project Coordinator
- 2010-2012** Research Assistant
- 2010-2011** Policy Intern, Massachusetts Public Health Association
- 2009-2010** Macro Social Work Intern, Cambridge Housing Authority
- 2008-2009** Volunteer, Asmita Resource Centre for Women
- 2006-2008** The Women's Lunch Place
- 2007-2008** Volunteer Program Coordinator
- 2006-2007** Program Assistant
- 2005-2006** Legislative Aide, Massachusetts House of Representatives

**Researcher (2017-2019) and Research Analyst (2016-2017), Medicare Access and CHIP (Children's Health Insurance Program) Reauthorization Act of 2015 (MACRA) Evaluations of Section 303 (2016-).** Supported the federal government and about 50 state- and community-based awardees that work to enroll eligible children and parents into Medicaid and CHIP, as authorized by MACRA. Designed and delivered technical assistance (including webinars and small-group peer discussions) to help awardees meet outreach and enrollment goals and created data collection and reporting systems. Created written technical assistance products to disseminate effective strategies for enrolling hard-to-reach populations. Analyzed qualitative and quantitative metrics to track outreach and enrollment and documented barriers and lessons learned; wrote reports for the Centers for Medicare & Medicaid Services (CMS).

**Researcher, Evidence Review for Community-Wide Policy Interventions (2018).** Coauthored a white paper for the Centers for Disease Control and Prevention identifying core components of four community-wide policy interventions to improve population health, along with the evidence base behind each component. Policy areas in the paper included (1) early childhood education, (2) public transportation, (3) home improvement loans and grants, and (4) earned income tax credits.

**Task Lead (2016-2018) and Research Analyst (2014-2016), County Health Rankings & Roadmaps Initiative (2014-2018).** Led key tasks on an evaluation of the County Health Rankings & Roadmaps initiative of RWJF and the University of Wisconsin Population Health Institute. This initiative aimed to raise awareness about the social, economic, and environmental factors that affected health and provided coaching to multisector community partnerships to enhance their ability to improve community health. Led interviews with partnership members to assess the effect of the coaching on their coalition's health promotion activities, community engagement, and ability to address health equity. Designed and conducted qualitative analysis and created memos, reports, and presentations to provide regular feedback on program results. Identified key facilitators and challenges to community-based efforts to engage individuals with lived experience and promoted health equity.

**Research Analyst, Study of Children's Physical Activity in Colorado (2016).** Conducted qualitative analysis and co-wrote report for a study to assess perceptions of barriers and opportunities for children to participate in physical activity during out-of-school time among children and caregivers living in low-income communities in Colorado. The findings from this study helped the foundation identify programs and projects to fund throughout the state to promote children's physical activity.

**Research Analyst, Evaluation of the U.S. Department of Health and Human Services (DHHS) Action Plan to Reduce Racial and Ethnic Health Disparities (2012-2016).** Contributed to development and implementation of a comprehensive assessment of the Disparities Action Plan, development of a data collection and monitoring system to track Plan implementation and outcomes, and the provision of evaluation technical assistance. Developed logic models to guide assessment design, short- and long-term indicators to measure implementation of Plan actions and overall progress toward outcomes, reporting templates for use by 16 federal agencies, and an analysis plan. Wrote the Office of Minority Health's first implementation progress report on the Plan, designed to publicize key findings, and the final assessment report. The Plan is designed to reduce racial and ethnic disparities in health outcomes by improving health care quality and access; building health workforce capacity, diversity, and cultural competence; and advancing scientific knowledge and innovation to improve monitoring of health disparities and design of interventions to address them.

### **Partners in Health & Housing Prevention Research Center; Boston, MA**

As **Program Coordinator (2012)** for the Boston Senior Health Program, coordinated a community-based program designed to reduce oral health inequities among low-income seniors residing in public housing. Trained and supervised five public housing residents as they conducted outreach to other residents, resulting in a doubled rate of participation at community oral health screenings and attendance at follow-up dental appointments.

### **Boston University School of Social Work; Boston, MA**

As **Graduate Research Fellow/Project Coordinator (2011-2012)** for the Project BRIGHT (Building Resilience through Intervention: Growing Healthier Together) Evaluation, managed data collection, statistical analysis, and federal reporting requirements for the evaluation of a \$1.2 million Substance Abuse & Mental Health Services Administration grant to deliver a parenting intervention for mothers with substance use disorders currently experiencing homelessness. Provided technical assistance to program staff on the data collection process. Supervised five research assistants in the collection and analysis of qualitative and quantitative data.

As **Research Assistant (2011-2012)** for the Social Welfare Policy Department, collected and analyzed the admissions and continued occupancy policies of public housing authorities across the country, focusing on analysis of policies restricting admission for individuals with criminal or substance use records.

As **Research Assistant (2010-2011)** for the Project BRIGHT Evaluation, assisted with data entry, management, and analysis.

### **Massachusetts Public Health Association; Jamaica Plain, MA**

As **Policy Intern (2010-2011)**, researched and coauthored the Act FRESH Campaign Report outlining policy proposals to increase statewide access to healthy food and space for physical activity. Provided support to the Act FRESH Coalition, a group of community-based organizations, public health agencies, advocacy groups, and health care provider organizations seeking policy and environmental changes to increase healthy eating/active living efforts in schools and other community settings. Contributed to a needs assessment designed to collect information on barriers and facilitators to healthy eating and active living in different parts of Massachusetts (urban and rural). Coordinated the four-organization Prevention Trust Coalition, which led an effort to include funds for community-based prevention in Massachusetts payment reform. Created fact sheets, legislative testimony, and PowerPoint presentations for use in various legislative advocacy efforts.

### **Cambridge Housing Authority; Cambridge, MA**

As **Macro Social Work Intern (2009-2010)** for The Work Force, designed and conducted an assessment of The Work Force's college preparatory program for low-income youth residing in public housing using qualitative and quantitative methods.

### **Asmita Resource Centre for Women; Hyderabad, India**

As **Volunteer (2008-2009)** for American Jewish World Service, designed and conducted an assessment of Asmita's community organizing efforts in an extremely low-income neighborhood using key stakeholder interviews and focus groups.

### **The Women's Lunch Place; Boston, MA**

As **Volunteer Program Coordinator (2007-2008)**, managed a 400-person volunteer program at a homeless shelter. Recruited, interviewed, and oriented new volunteers; managed scheduling; maintained the volunteer database; and wrote monthly newsletters. Provided direct services to low-income and homeless clients, including meals, clothing, and access to shower and laundry facilities.

As **Program Assistant (2006-2007)**, provided direct services to low-income and homeless clients. Assisted with coordination of volunteer program.

### **Massachusetts House of Representatives; Boston, MA**

As **Legislative Aide (2005-2006)**, researched policy issues, analyzed bills and budgets, and assisted with drafting of legislation. Served as an advocate for constituents and worked with local, state, and federal agencies to secure needed services. Responded to constituent inquiries regarding various bills and laws, including health care reform legislation.

## Selected Papers, Publications, and Technical Assistance Products

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Finkelstein, Daniel M., Dana M. Petersen, and Lisa S. Schottenfeld. "Promoting Children's Physical Activity in Low-Income Communities in Colorado: What Are the Barriers and Opportunities?" *Preventing Chronic Disease*, vol. 14, E124, December 2017.

Dorsey, Rashida, Dana M. Petersen, and Lisa Schottenfeld. "The Department of Health and Human Services Action Plan to Reduce Racial and Ethnic Health Disparities: A Commentary on Data Needs to Monitor Progress Toward Health Equity." *Health Systems and Policy Research*, vol. 3, no. 4, November 2016.

Kim, Jung, Lisa Schottenfeld, and Michaella Morzuch. "County Health Rankings & Roadmaps: Community Achievements and Funding Strategies." Submitted to Robert Wood Johnson Foundation. Princeton, NJ: Mathematica Policy Research, September 30, 2016.

Kim, Jung Y., Lisa Schottenfeld, Daniel M. Finkelstein, Jasmine S. Little, Michaella Morzuch, and Shannon Heitkamp. "Coaching Communities to Action: Findings from the Roadmaps to Health Pilot Coaching Program." Report submitted to the Robert Wood Johnson Foundation. Princeton, NJ: Mathematica Policy Research, August 31, 2016.

Schottenfeld, Lisa, Dana Petersen, So O'Neil, and Beth Stevens. "HHS Action Plan to Reduce Racial and Ethnic Health Disparities: Implementation Progress Report." Washington, DC: Office of the Assistant Secretary for Planning and Evaluation and Office of Minority Health, 2015.

Curtis, Marah A., Sarah Garlington, and Lisa Schottenfeld. "Alcohol, Drug, and Criminal History Restrictions in Public Housing." *Cityscape: A Journal of Policy Development and Research*, vol. 15, no. 3, 2013, pp. 37-52.

Ribble, Maddie, Lisa Schottenfeld, and Valerie Bassett. "Priorities for Healthy Places 2011-2012: Building Vibrant Communities for All Massachusetts Residents." Jamaica Plain, MA: Massachusetts Public Health Association, February 2011.

## Continuing Professional Development

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2019	Building Racial Equity Training Course
2013	Health Impact Assessment Practitioners Training Course

## Honors and Awards

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2012	Allan R. Meyers Memorial Prize for Excellence in Health Policy and Management, Boston University School of Public Health
2012	Delta Omega Public Health Honor Society
2012	Upsilon Phi Delta Health Services Honor Society
2012	Leonard Bloksberg Memorial Prize, Boston University School of Social Work

## Information Technology

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Microsoft Office, ATLAS.ti, NVivo



## Dallas Dotter

Researcher

### Experience

#### Mathematica

**Project Director and Co-Principal Investigator, Evaluation of Education Governance Reforms in Washington, DC (2018-).** Director and Co-Principal Investigator for a quasi-experimental study building evidence on the impacts of the Washington, DC, school reforms that began with major governance changes in 2007, and more recently include the build-out of a comprehensive unified application and enrollment system in 2014. The design uses a cohort growth approach, estimating the impacts of these policies on National Assessment of Educational Progress (NAEP) performance growth between grades 4 and 8 for cohorts of DC students, relative to cohorts in a comparison group of cities over the same time period.

**Site Impact Evaluation Lead, Evaluation of Supplemental Nutrition Assistance Program (SNAP) Employment and Training (E&T) Pilots (2015-).** Conduct impact evaluation and provide technical assistance on experimental research design and random assignment for a multisite randomized controlled trial across 10 states. The goal of the SNAP E&T Pilots study is to test the effectiveness of innovative strategies for increasing employment and earnings among SNAP participants and reducing their dependence on SNAP and other public assistance programs. This study is funded by USDA, FNS.

**Multivariate Analysis Lead, School Nutrition and Meal Cost Study II (2017-).** Lead multivariate analyses on a five-year national study of the National School Lunch Program (NSLP) and School Breakfast Program (SBP) that iterates upon previous work assessing the effects of participation in school meal programs under the new meal pattern and nutrient requirements and other regulations resulting from the Healthy, Hunger-Free Kids Act of 2010. Investigate how impacts of program participation on student dietary outcomes are related to program implementation factors including school food operations; nutritional quality of meals offered and served; meal costs and revenues. Estimate and report on the relationships between nutrition quality, meal costs, and participation during school year 2019–2020 for the U.S. Department of Agriculture (USDA), Food and Nutrition Service (FNS).

**Researcher, Design and Feasibility of an Impact Study of Magnet Schools (2017-).** Research design and feasibility assessment for analysis of the impacts of magnet schools that were part of the federal Magnet School Assistance Program grantees from fiscal years 2016 and 2017. Analyze complex lotteried admission procedures and outcomes for grantee schools to determine feasible experimental research designs using randomized assignments of students. Design analysis techniques and, if the option is exercised, conduct evaluation of the causal impacts of magnet schools on student outcomes.

**Project Director, School Enrollment Demand Simulator (2017-).** Develop and validate a predictive model of school enrollment demand using rank-ordered common school lottery applications for Washington, DC, public and public charter schools. Translate this model to an interactive data dashboard for stakeholders to simulate enrollment demand for schools in response to hypothetical policy changes, such as school relocations, capacity expansions, or new programmatic offerings. This study builds upon previous work using application data to estimate choosers' preferences for school attributes and is funded by a grant from the Walton Family Foundation.

#### Education

**2013** Ph.D., Economics, University of California, San Diego

**2007** B.S., Economics, magna cum laude, University of North Texas

#### Positions

**2013-** Mathematica

**2009-2013** Research Associate, San Diego Education Research Alliance

**2008-2012** University of California  
**2012** Instructor

**2008-2012** Teaching Assistant

**2009-2011** Research Assistant

**Researcher, Market Signals: Deep Dive Analysis of Parental School Choice in Washington, DC (2014-2016).** Analyzed rank-ordered school preferences submitted by DC families as part of the unified district and charter school lottery process called My School DC. The study used econometric analysis to estimate choosers' preferences for different school and neighborhood attributes and commuting distance. The resulting parameters were then used to simulate outcomes under different school assignment and choice policies. This project was funded with a grant from the Walton Family Foundation.

**Researcher, Impact of 2007 School Reforms on District of Columbia Public Schools (DCPS) (2013-2014).** Described the retention of effective teachers, the distribution of teacher effectiveness across schools, and the experience and tenure of principals following the passage of the DC Public Education Reform Amendment Act. Examined trends in the effectiveness of DCPS teachers over time. Responded to the DC auditor's request for this analysis in partnership with participating organizations in the DC Education Consortium on Research and Evaluation, including the American Institutes for Research, Policy Studies Associates, and the RAND Corporation.

### **San Diego Education Research Alliance; University of California, San Diego**

As **Research Associate (2009-2013)**, conducted analyses for the U.S. Department of Education, National Assessment of Career and Technical Education, on the relationships between participation in career and technical education in San Diego and postsecondary enrollment, persistence and attainments. Performed analyses on independent and team research projects as part of a collaboration between the University of California, San Diego Department of Economics and the San Diego Unified School District, including linking postsecondary records and intelligence testing scores of students to administrative data.

### **Papers and Publications**

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Walsh, Elias, and Dallas Dotter. "The Impact of Replacing Principals on Student Achievement in DC Public Schools." *Education Finance and Policy*, forthcoming (posted online December 2018).

Walsh, Elias, Dallas Dotter, and Albert Y. Liu. "Can More Teachers Be Covered? The Accuracy, Credibility, and Precision of Value-Added Estimates with Proxy Pre-tests." *Mathematica Policy Research Working Paper No. 64*. Princeton, NJ: Mathematica Policy Research, August 2018.

Glazerman, Steven, and Dallas Dotter. "Market Signals: Evidence on the Determinants and Consequences of School Choice from a Citywide Lottery." *Educational Evaluation and Policy Analysis*, vol. 39, no. 4, 2017, pp. 593-619.

Liu, Albert Y., Elias Walsh, and Dallas Dotter. "Measuring Teacher and School Value Added in Oklahoma, Spring 2016." Issue brief submitted to the Oklahoma State Department of Education. Washington, DC: Mathematica Policy Research, May 2016.

Moore, Quinn, Judith Cannon, Dallas Dotter, Esa Eslami, John Hall, Joanne Lee, Alicia Leonard, Nora Paxton, Michael Ponza, Emily Weaver, Eric Zeidman, Mustafa Karakus, and Roline Milfort. "Program Error in the National School Lunch Program and School Breakfast Program: Findings from the Second Access, Participation, Eligibility and Certification Study (APEC II)." Final report submitted to the U.S. Department of Agriculture, Food and Nutrition Service, Office of Policy Support. Princeton, NJ: Mathematica Policy Research, May 2015.

Walsh, Elias, Albert Y. Liu, and Dallas Dotter. "Measuring Teacher and School Value Added in Oklahoma, 2013-2014 School Year." Final report submitted to the Oklahoma State Department of Education. Washington, DC: Mathematica Policy Research, February 2015.

Walsh, Elias, and Dallas Dotter. "Longitudinal Analysis of the Effectiveness of DCPS Teachers." Washington, DC: Mathematica Policy Research, July 2014.

Dotter, Dallas. "Essays on the Impacts of Education Policies." Doctoral dissertation. San Diego: University of California, San Diego, 2013.

Dotter, Dallas. "Breakfast at the Desk: The Impact of Universal Classroom Breakfast Programs on Academic Performance." Working paper. San Diego: University of California, San Diego, 2012.

Betts, Julian, Andrew Zau, John McAdams, and Dallas Dotter. "Career and Technical Education in San Diego: A Statistical Analysis of Course Availability, Student Course-Taking Patterns, and Relationships with High School and Postsecondary Outcomes." Washington, DC: U.S. Department of Education, National Assessment of Career and Technical Education, 2011.

## Honors and Awards

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2012-2013	Spencer Dissertation Fellow, National Academy of Education
2011-2012	Clive Granger Research Fellowship
2011-2012	Teaching Excellence Award, University of California, San Diego
2008-2009	Graduate Research Fellowship, University of California, San Diego
2007	Jack Johnson Scholarship
2007	George Benz Scholarship
2006	Arthur A. Smith Memorial Award

## Information Technology

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R, Stata, MATLAB, SAS

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**Subject matter expertise and quality assurance**

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## David Jones

Associate Director and Senior Researcher

### Experience

#### Mathematica

**Project Director and Coprincipal Investigator, Multicity Evaluation of Sugar-Sweetened Beverage (SSB) Taxes (2016-2019).** Lead a study funded by the Robert Wood Johnson Foundation to examine the impacts of SSB taxes in Oakland, CA and Philadelphia, PA on key outcomes for children and families who are at high risk of experiencing childhood obesity. Mathematica collected price and marketing information in treatment cities and comparison areas prior to and after the implementation of SSB taxes from in-store observations and conducted two related surveys of consumers (from households with children) using a retailer exit survey and a household consumption survey. Mathematica supplemented primary data collection with household purchasing data from a secondary data source.

**Principal Investigator, Understanding the Risks of Tackling in Youth Football (2016-2019).** Co-led a study funded by the Centers for Disease Control and Prevention (CDC) to conduct a mixed-method multi-component approach to better understand the risks of tackling in youth football through three primary components: a descriptive study that examines head impacts and concussion rates by age, level of play, and program type; a cluster randomized controlled trial to examine the effectiveness of shoulder-style tackling; and a qualitative study of the perceptions and experiences of parents and coaches on the benefits of alternative techniques and the potential for injury among youth participants in football.

**Deputy Project Director (2017-), Task Lead (2016-2017), Coordinating Center for Comparative Health System Performance (2016-).** Lead data analyses related to identifying and examining characteristics of health systems and entities linked to the systems. The purpose of the Agency for Healthcare Research and Quality (AHRQ)-funded Coordinating Center is to support the AHRQ Centers of Excellence (CoE) on Comparative Health System Performance activities by leveraging expertise, infrastructure, and resources across three CoEs. The Coordinating Center conducts activities such as analyzing data; convening stakeholders and technical experts; and facilitating collaboration across CoEs to harmonize data, methods, and measures. It serves as the focal point for synthesizing research and evidence from the CoEs on the characteristics of high-performing health systems and practices and as a resource to promote broad dissemination of research on these to accelerate patient-centered outcomes research dissemination to improve health system performance.

**Project Director, Marijuana Baseline Health Study (2017-2018).** Led Mathematica's piece of a comprehensive baseline study of marijuana use funded by the Massachusetts Department of Public Health. Mathematica estimated the economic and fiscal impacts of marijuana legalization for state and local governments in the commonwealth, including impacts related to the production and distribution of marijuana in the illicit market as well as costs and benefits to state and local revenue.

### Education

**2008** Ph.D., Economics, University of North Carolina at Chapel Hill

**2001** B.A., Environmental Sciences and Policy, Duke University

### Positions

**2008-** Mathematica

**2015-** Associate Director

**2015-** Cambridge Health Researcher Supervisor

**2012-** Senior Researcher

**2013-2015** Cambridge Health Analyst Supervisor

**2008-2012** Researcher

**2003-2008** University of North Carolina at Chapel Hill

**2003, 07-08** Research Assistant

**2004-08** Teaching Assistant

**2001-2003** Associate Analyst, Abt Associates, Inc.

**1998-2001** Research Assistant, Duke University

**Evaluation Lead, Well-Integrated Screening and Evaluation for Women Across the Nation (WISEWOMAN) Evaluation, Technical Assistance, and Data Management (2013-).** Led design and implementation of the national evaluation. The WISEWOMAN program, implemented by the CDC, funds 21 grantees to provide cardiovascular screening and lifestyle programs to un- and under-insured women ages 40-64. This project includes the design and implementation of an evaluation to assess program effect, technical assistance on collection and reporting of minimum data elements (MDEs), and development and maintenance of a web-based system for grantees to report MDEs.

**Project Director, Establishing Health Care Spending Projections and Certifying Actual Health Care Spending (2013-2018).** Led the extension of previous work to project health care spending in Minnesota, sponsored by the Minnesota Department of Health, Health Economics Program. Mathematica also estimated the impact of federal health care reform on projected spending in the state using microsimulation techniques. In addition, Mathematica used hospital discharge and emergency department data and the state's all-payer claims database (APCD) to examine recent trends in inpatient hospital utilization and emergency department use and cost drivers of privately insured spending. Finally, Mathematica used the APCD to estimate the cost of selected chronic conditions.

**Task Lead, Hospital Quality Reporting Program Support Contract (2015-2016).** Led the reevaluation of the scoring methodology used in the Hospital-Acquired Condition Reduction Program, implemented by the Centers for Medicare & Medicaid Services (CMS), to identify the worst-performing quartile of hospitals to be subject to a payment penalty. The reevaluation effort includes an environmental scan and a technical expert panel to collect information on limitations of the current methodology and identify promising solutions. The information will be incorporated in a revised scoring methodology, which will be tested to determine the effect on hospital results and the identification of the worst-performing hospitals. The results of the testing will inform a recommended final scoring methodology.

**Researcher, Recalibration of the Agency for Healthcare Research and Quality Patient Safety Indicators (PSIs) to Medicare Fee-For-Service (FFS) (2015-2016).** Co-led the design and implementation of an analysis, sponsored by AHRQ, to estimate the effect of inpatient hospital patient safety events on mortality, readmissions, and costs of care.

**Evaluation Lead, Transformed Healthy Start Evaluation Design and Plan (2012-2014).** Led evaluation design and final evaluation plan. The Healthy Start program, funded by the Health Resources and Services Administration, Maternal and Child Health Bureau, is undergoing a transformation and requires an evaluation design and plan to assess the updated program model. The design and plan will include details for a mixed-method approach to the evaluation, site selection criteria, sampling approaches, data collection instruments, and timeline.

**Project Director, Improving the Agency for Healthcare Research and Quality Quality Indicators (QIs) (2012-2014).** Led the assessment of the validity of the AHRQ QIs as they influence hospital comparisons, including potential bias by hospital characteristics. Led the design and implementation of the analyses, which focus on how the current risk-adjustment, reliability-adjustment, and compositing methods could lead to bias by hospital characteristics. Based on the findings from these analyses, Mathematica will recommend and test improvements to the measures. In the final phase of the project, Mathematica will recommend a process for AHRQ to regularly reassess and potentially retire the QIs.

**Researcher, Production and Implementation of Hospital Outcome/Efficiency Measures (2009-2014).** Served as AHRQ measures leader for the production and implementation of the AHRQ PSIs and inpatient quality indicators (IQIs) for hospitals, using CMS data. Led research tasks related to the testing of the AHRQ PSIs and IQIs, including studies of the impact of truncated diagnosis strings on hospital results and the variation in geographic access to high quality hospitals among low socioeconomic status and minority populations. The indicators are publicly reported on the CMS Hospital Compare website and versions of the measures are used in the Hospital Value-Based Purchasing program.

**Project Director (2011-2014), Researcher (2008-2010), Medicare Enrollment/Disenrollment Analysis (2008-2014).** Led design and implementation of analyses of enrollment/disenrollment decisions of enrollees



in Medicare Advantage (MA) plans. In the first three years of the study, sponsored by CMS, Mathematica assessed which beneficiaries enroll in MA, which switch plans or disenroll from MA into FFS Medicare, and how plan and market factors affect these decisions. In the final two years, the project focused on a longitudinal analysis of enrollment/disenrollment over time and the factors that are associated with those decisions to stay in the current MA plan, switch to a new MA plan, or switch to FFS.

**Project Director, For-Profit Program of All-Inclusive Care for the Elderly (PACE) Study (2011-2013).**

Led design and implementation of an evaluation of quality and access to care of for-profit PACE. PACE is an innovative program that seeks positive outcomes and cost savings by providing a range of integrated preventative, acute care, and long-term care services to manage the needs of the frail elderly receiving Medicare and Medicaid. The study, sponsored by CMS, focused on the differences in care between for-profit and not-for-profit PACE plans in Pennsylvania. As part of the study, Mathematica surveyed enrollees at for-profit and not-for-profit PACE sites.

**Coprincipal Investigator, Food Security and Access to Retail Food Establishments Among Emergency Food Program Recipients (2010-2012).**

Led descriptive and multivariate analysis of geographic access to emergency food programs, sponsored by the U.S. Department of Agriculture, Economic Research Service. The project had two research objectives: characterize emergency food program location in relation to the retail food environment and local population characteristics, and study the relationship between household food security and access to both the retail food environment and the emergency food environment.

**Project Director (2011-2012), Researcher (2008-2010), Projecting Minnesota State Health Care Expenditures (2008-2012).**

Led the development of health care spending projections in Minnesota, sponsored by the Minnesota Department of Health, Health Economics Program. Mathematica projected health care expenditures in Minnesota by service and payer types over a 10-year period, employing the same basic method used by CMS to estimate their National Health Expenditure Accounts. Mathematica added Minnesota-specific data sources and explored alternate model specifications to improve the predictive power of the models. In addition, Mathematica added to the methodology to account for the recent recession and federal health care reform.

**Researcher, Evaluation of the Delta Health Initiative (DHI) (2008-2011).** Coauthored various reports and led data analyses. Assisted the Delta Health Alliance (DHA) in designing and implementing the Delta Promise Community Project, a project modeled after the Harlem Children's Zone. DHA contracted with Mathematica to conduct a comprehensive evaluation of DHI that provides an overall assessment of DHA's efforts and progress toward meeting its goals.

**Researcher, Effect of the 2008 Massachusetts Cigarette Excise Tax Increase on Cigarette Prices and Advertising Practices (2008-2010).** Served as lead author and performed technical analysis for the final reports and manuscript. The Massachusetts Tobacco Control Program contracted with Mathematica to conduct the 2008 and 2009 Massachusetts Cigarette Pricing Surveys and to study the effect of the recent state and federal tax increases on retailers' prices and advertising practices. The study examined the proportion of the tax increases that was passed on to the consumer and the factors that were associated with the level of the price change. In addition, Mathematica analyzed how cigarette advertising changed after the increase.

**Researcher, What Works Clearinghouse (WWC) (2008 - 2009).** Reviewed research on interventions that aim to improve access to higher education and retention of students once they have enrolled. This project, sponsored by the U.S. Department of Education, conducts systematic reviews of the research literature and characterizes the effectiveness of interventions in reports posted on the WWC web page.

**University of North Carolina at Chapel Hill; Chapel Hill, NC**

As **Research Assistant (2003, 2007-2008)** for the Economics Department and the Carolina Population Center, worked with professors in developing and implementing research methodologies. Coauthored a paper on the evolution of health insurance coverage in Indonesia during the Southeast Asian financial crisis of the late 1990s.

As **Teaching Assistant (2004-2008)**, assisted professors in teaching introductory microeconomics and macroeconomics courses including lecturing and preparing homework and exams. Served as lead teaching assistant.

### **Abt Associates, Inc.; Cambridge, MA**

As **Associate Analyst (2001-2003)**, worked to model the risks of childhood lead poisoning in Baltimore, Boston, and Chicago. Wrote case studies detailing the lead prevention activities in Baltimore, Chicago, Iowa, Oakland, and Providence.

### **Duke University; Durham NC**

As **Research Assistant (1998-2001)**, worked on various research projects in environmental economics. Created and managed databases and wrote reports.

## **Papers and Publications**

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Furukawa, Michael, David J. Jones, Laura Kimmey, Rachel Machta, Jing Guo, and Eugene Rich. "Consolidation of Providers into Health Systems Increased Substantially from 2016 to 2018." Working paper, 2019.

Hurwitz, Andrew, Kelley Borradaile, Ravi Goyal, and David J. Jones. "A Randomized Controlled Trial of an Intervention to Reduce Head Impact in Youth Football." Working paper, Princeton, NJ: Mathematica, 2019.

Cawley, John, David Frisvold, Anna Hill, and David Jones. "The Impact of the Philadelphia Beverage Tax on Prices and Product Availability." Forthcoming, Journal of Policy Analysis & Management, 2019a.

Cawley, John, David Frisvold, and David Jones. "The Impact of Sugar-Sweetened Beverage Taxes on Purchases: Evidence from Four City-Level Taxes in the U.S." NBER Working Paper #26393. Cambridge, MA: National Bureau of Economic Research, 2019. Under review at Health Economics.

Machta, R., J. Reschovsky, D. Jones, M. Furukawa, and E. Rich. "Can Vertically Integrated Health System Provide Greater Value: The Case of Hospitals Under the Comprehensive Care for Joint Replacement Model." Under review at Health Services Research.

Keshaviah, Aparna, Eric Morris, Dara Lee Luca, Huihua Lu, Sarah Bardin, Colleen Staatz, and David Jones. "Marijuana Legalization: Public Health, Safety, and Economic Factors for States to Consider." Princeton, NJ: Mathematica, 2019.

Cawley, John, David Frisvold, Anna Hill, and David Jones. "Oakland's Sugar-Sweetened Beverage Tax: Impacts on Prices, Purchases and Consumption by Adults and Children." NBER Working Paper #26233. Cambridge, MA: National Bureau of Economic Research, 2019. Revise & resubmit, Economics & Human Biology.

Furukawa, Michael, Laura Kimmey, David J. Jones, Rachel M. Machta, and Eugene Rich. "Consolidation And Health Systems In 2018: New Data From The AHRQ Compendium." Health Affairs Blog, November 25, 2019.

Kimmey, Laura, Rachel Machta, Ken Peckham, David Jones, and Eugene Rich. "Comparative Health System Performance Initiative: Compendium of U.S. Health Systems, 2018, Technical Documentation" AHRQ publication no. 20-0011. Washington, DC: Mathematica Policy Research, November 2019.

Kimmey, Laura, Ken Peckham, David Jones, Rachel Machta, and Eugene Rich. "Comparative Health System Performance Initiative: Compendium of U.S. Health Systems, 2018, Hospital Linkage File, Technical Documentation." AHRQ publication no. 20-0010. Washington, DC: Mathematica Policy Research, November 2019.

Cawley, John, David Frisvold, and David Jones. "Multi-City Study Shows Beverage Taxes Raise Prices, Reduce and Shift Purchases." Princeton, NJ: Mathematica, October 21, 2019.

Jones, David, Rachel Machta, Eugene Rich, and Ken Peckham. “Comparative Health System Performance Initiative: Compendium of U.S. Health Systems, 2016, Group Practice Linkage File, Technical Documentation.” AHRQ publication no. 19-0083. Washington, DC: Mathematica Policy Research, October 2019.

Holdbrook, Jeanette, Dana Petersen, David Jones, and David Frisvold. “How Retailers Responded to taxes on Sweetened Beverages: A Tale of Two Cities.” Princeton, NJ: Mathematica, September 16, 2019.

Cawley, John, David Frisvold, Anna Hill, and David Jones. “The Impact of the Philadelphia Beverage Tax on Purchases and Consumption by Adults and Children.” *Journal of Health Economics*, vol. 67, 2019, pp. 1–16.

Machta, Rachel M., Michael F. Furukawa, Jessica Heeringa, David J. Jones, Justin Timbie, Ashley M. Kranz, Valerie A. Lewis, and Eugene C. Rich. “Safety Net Hospitals in Health Systems: Variation in ACO Participation and Other Characteristics.” Washington, DC: Mathematica, July 3, 2019.

Vine, Michaela, Katie Morrison Lee, Amanda Markovitz, Lauren Vollmer, Tiffany Olszuk, and David Jones. “WISEWOMAN Comprehensive Evaluation Plan.” Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, May 31, 2019.

Jones, David, Anna Hill, David Frisvold, and John Cawley. “What We Learned from Philadelphia’s Tax on Sweetened Beverages.” Princeton, NJ: Mathematica, March 12, 2019.

Agency for Healthcare Research and Quality. “Provider-Offered Medicare Advantage Plans Among U.S. Health Systems, 2016, Data Highlight, No. 7. AHRQ publication no. 19-0025-3-EF. Rockville, MD: Agency for Healthcare Research and Quality, March 2019 (contributing author).

Furukawa, M., R. Machta, K. Barrett, D. Jones, S. Shortell, D. Scanlon, V. Lewis, J. O’Malley, E., Meara, and E. Rich. “Landscape of Health Systems in the United States.” *Medical Care Research and Review*, January 23, 2019. <https://doi.org/10.1177/1077558718823130>.

Agency for Healthcare Research and Quality. “Health System Participation in Medicare Bundled Payment Models, 2016, Data Highlight, No. 6. AHRQ publication no. 19-0025-3-EF. Rockville, MD: Agency for Healthcare Research and Quality, January 2019 (contributing author).

Agency for Healthcare Research and Quality. “Provider-Offered Insurance Products Among U.S. Health Systems, 2016, Data Highlight, No. 5. AHRQ publication no. 19-0025-2-EF. Rockville, MD: Agency for Healthcare Research and Quality, January 2019 (contributing author).

Agency for Healthcare Research and Quality. “Health System Participation in Accountable Care Organizations (ACOs), 2016, Data Highlight, No. 4. AHRQ publication no. 19-0025-1-EF. Rockville, MD: Agency for Healthcare Research and Quality, January 2019 (contributing author).

Barrett, Kirsten, Ken Peckham, David Jones, Rachel Machta, Jessica Heeringa, and Eugene Rich. “Comparative Health System Performance Initiative: Compendium of U.S. Health Systems, 2016, Hospital Linkage File, Technical Documentation” AHRQ publication no. 18-0063. Washington, DC: Mathematica Policy Research, October 2018.

Jones, David, So O’Neil, Katie Morrison, Allison Steiner, and Lauren Vollmer. “WISEWOMAN Summative Evaluation Report.” Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, September 28, 2018.

Cawley, John, David Frisvold, Anna Hill, and David Jones. “The Impact of the Philadelphia Beverage Tax on Purchases and Consumption by Adults and Children.” NBER Working Paper no. 25052. Cambridge, MA: National Bureau of Economic Research, September 2018.

Cawley, John, David Frisvold, Anna Hill, and David Jones. “The Impact of the Philadelphia Beverage Tax on Prices and Product Availability.” NBER Working Paper no. 24990. Cambridge, MA: National Bureau of Economic Research, September 2018. Highlighted in *The NBER Digest*, December 2018.

Cawley, John, Chelsea Crain, David Frisvold, Anna Hill, and David Jones. "The Pass-Through of the Largest Tax on Sugar-Sweetened Beverages: The Case of Boulder, Colorado." NBER Working Paper no. 25050. Cambridge, MA: National Bureau of Economic Research, September 2018.

Jones, David, Deborah Chollet, and Sarah Schoenfeldt. "Projected Health Care Spending in Minnesota 2017-2026." Submitted to the Minnesota Department of Health, Health Economics Program. Washington, DC: Mathematica Policy Research, July 17, 2018.

Keshaviah, Aparna, Eric Morris, Dara Lee Luca, Huihua Lu, Sarah LeBarron, Colleen Staatz, and David Jones. "From Medical to Retail Marijuana: Estimating Fiscal Effects of Legalization in Massachusetts." Submitted to the Massachusetts Department of Public Health, Bureau of Health Care Safety and Quality. Cambridge, MA: Mathematica Policy Research, April 30, 2018.

Machta, Rachel, Kristin Mauer, David Jones, Michael Furukawa, and Eugene Rich. "A Systematic Review of Vertical Integration and Quality of Care, Efficiency, and Patient-Centered Outcomes." *Health Care Management Review*, vol. 48, no. 1, 2018.

Jones, David, Michaela Vine, So O'Neil, Lauren Vollmer, and Katie Morrison. "WISEWOMAN National Evaluation Plan: Summative Evaluation." Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, January 19, 2018.

Cohen, Genna, David Jones, Jessica Heeringa, Kirsten Barrett, Michael Furukawa, Dan Miller, Anne Mutti, James Reschovsky, Rachel Machta, Stephen Shortell, Taressa Frazee, and Eugene Rich. "Leveraging Diverse Data Sources to Identify and Describe U.S. Health Care Delivery Systems." *eGEMS*, vol. 5, no. 3, 2017.

Barrett, Kirsten, Ken Peckham, David Jones, Rachel Machta, Jessica Heeringa, and Eugene Rich. "Comparative Health System Performance Initiative: Compendium of U.S. Health Systems, 2016, Technical Documentation." AHRQ publication no. 17-0047-EF. Washington, DC: Mathematica Policy Research, September 2017.

Agency for Healthcare Research and Quality. "Snapshot of U.S. Health Systems, 2016." Comparative Health System Performance Initiative, Data Highlight, No. 1. AHRQ publication no. 17-0046-1-EF. Rockville, MD: Agency for Healthcare Research and Quality, September 2017 (contributing author).

Agency for Healthcare Research and Quality. "U.S. Health System Characteristics, 2016." Comparative Health System Performance Initiative, Data Highlight, No. 2. AHRQ publication no. 17-0046-3-EF. Rockville, MD: Agency for Healthcare Research and Quality, September 2017 (contributing author).

Agency for Healthcare Research and Quality. "Variation in Health System Characteristics Across States, 2016." Comparative Health System Performance Initiative, Data Highlight, No. 3. AHRQ publication no. 17-0046-2-EF. Rockville, MD: Agency for Healthcare Research and Quality, September 2017 (contributing author).

Jones, David, Deborah Chollet, and Sarah Schoenfeldt. "Projected Health Care Spending in Minnesota 2015-2024." Submitted to the Minnesota Department of Health, Health Economics Program. Washington, DC: Mathematica Policy Research, December 29, 2016.

Jones, David, Lauren Vollmer, Michaela Vine, So O'Neil, Katie Morrison, and Tess Kerwin. "WISEWOMAN National Evaluation: Outcomes Evaluation." Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, October 17, 2016.

Engineer, Lilly, Bradford Winters, Christine Weston, Allen Zhang, Ritu Sharma, E. Bass, David Jones, Amy Rosen, Frank Yoon, Ann Borzecki, and Sydney Dy. "Hospital Characteristics and the Agency for Healthcare Research and Quality Inpatient Quality Indicators: A Systematic Review." *Journal for Healthcare Quality*, vol. 38, no. 5, 2016, pp. 304-313.

Jones, David, So O'Neil, Michaela Vine, Ravi Goyal, and Lauren Vollmer. "WISEWOMAN National Evaluation Plan: Outcomes Evaluation." Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, January 15, 2016.

Schone, Eric, David Jones, Alex Bohl, and William Encinosa. "Impacts of Patient Safety Indicator (PSI) Events on Mortality, Readmissions, and Medicare Reimbursement." Unpublished manuscript. Cambridge, MA: Mathematica Policy Research, 2016.

Dy, Sydney, Allen Zhang, Christine Weston, Bradford Winters, Ritu Sharma, David Jones, Eric Schone, Frank Yoon, Amy Rosen, Ann Borzecki, Qi Chen, and Lilly Engineer. "Associations Between Hospital Characteristics and the Agency for Healthcare Research and Quality Patient Safety Indicators (PSIs): A Systematic Review." Unpublished manuscript. Cambridge, MA: Mathematica Policy Research, 2016.

Kallem, Crystal, Mariel Finucane, David Jones, Daniel Kassler, Bailey Orshan, Dawn Sievert, and Lauren Vollmer. "Reevaluation of the HAC Reduction Program Scoring Methodology." Submitted to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services. Cambridge, MA: Mathematica Policy Research, December 31, 2015.

Kallem, Crystal, Mariel Finucane, Jessica Heeringa, David Jones, Bailey Orshan, Sam Penoyer, Dawn Sievert, and Lauren Vollmer. "Hospital-Acquired Condition Reduction Program Scoring Methodology Reevaluation: Literature Review." Submitted to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services. Cambridge, MA: Mathematica Policy Research, November 23, 2015.

O'Neil, So, Michaela Vine, David Jones, Katie Morrison, Liz Crane, Ray Noonan, and Anthony Austin. "WISEWOMAN National Evaluation: Process Evaluation." Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, October 2015.

Jones, David, Deborah Chollet, Michaela Vine, Thomas Bell, and Sarah Schoenfeldt. "Projected Health Care Spending in Minnesota 2009-2023 and Effects of the Affordable Care Act on Spending." Submitted to the Minnesota Department of Health, Health Economics Program. Washington, DC: Mathematica Policy Research, August 24, 2015.

Jones, David, Deborah Chollet, and Miki Satake. "A Study of Inpatient Hospital Admissions and Length of Stay in Minnesota from 2005 to 2013." Final report. Cambridge, MA: Mathematica Policy Research, August 7, 2015.

Hill, Anna, David Jones, Deborah Chollet, and Miki Satake. "Emergency Department Use in Minnesota from 2005 to 2013." Final report. Cambridge, MA: Mathematica Policy Research, August 5, 2015.

O'Neil, So, Michaela Vine, David Jones, and Katie Morrison. "WISEWOMAN National Evaluation Plan: Process Evaluation." Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, January 2015.

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Bohl, Alex, David Jones, Sarah Schoenfeldt, and Dmitriy Poznyak. "Hitting the Target: Shrinking the AHRQ Quality Indicators to More Informed Priors." Submitted to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality. Cambridge, MA: Mathematica Policy Research, December 15, 2014.

Wang, Sheng, Mariel Finucane, Xiaojing Lin, Frank Yoon, and David Jones. "Reliability Adjustment of the AHRQ Quality Indicators Under an Empirical Bayes Framework." Submitted to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality. Cambridge, MA: Mathematica Policy Research, December 12, 2014.



Chen, Qi, Ann Borzecki, Amy Rosen, Hali Hambridge, Alex Bohl, Sheng Wang, Eric Schone, Frank Yoon, and David Jones. "Comparison of Standardization Methods for Risk Adjustment in the AHRQ Quality Indicators." Submitted to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality. Cambridge, MA: Mathematica Policy Research, December 1, 2014.

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Jones, David, So O'Neil, Hali Hambridge, Anthony Austin, and Michaela Vine. "WISEWOMAN National Evaluation Plan." Submitted to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention. Cambridge, MA: Mathematica Policy Research, May 2014.

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Bohl, Alex, David Jones, Matthew Sweeney, and Dejene Ayele. "The Impact of Truncating Diagnosis Codes on the Accuracy of the AHRQ Patient Safety Indicators." Working paper, 2013.

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Jones, David J. "Primary Prevention and Health Outcomes: Treatment of Residential Lead-Based Paint Hazards and the Incidence of Childhood Lead Poisoning." *Journal of Urban Economics*, vol. 71, 2012, pp. 151-164.

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- McLaughlin, Catherine, David Jones, Kevin Bradway, Angela Merrill, and Sandi Nelson. "Medicare Beneficiary Enrollment into and Disenrollment out of Medicare Advantage Plans." Submitted to the U.S. Department of Health and Human Services Centers for Medicare & Medicaid Services. Ann Arbor, MI: Mathematica Policy Research, December 2011.
- Schone, Eric, Mai Hubbard, and David Jones. "Reporting Period and Reliability of AHRQ, CMS 30-Day and HAC Quality Measures." Memorandum. Princeton, NJ: Mathematica Policy Research, November, 18, 2011.
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- Hubbard, Mai, David Jones, Angela Merrill, Candace Natoli, Eric Schone, and Marian Wrobel. "30-Day Mortality and Readmission Measures, 2011." Final report submitted to U.S. Department of Health and Human Services Centers for Medicare & Medicaid Services. Cambridge, MA: Mathematica Policy Research, May 9, 2011.
- Rosenbach, Margo, David Jones, Rosemary Borck, Mai Hubbard, Michaela Morzuch, and Cicely Thomas. "Toward Health System Change in the Mississippi Delta: Evolution and Assessment of the Delta Health Initiative." Submitted to the Delta Health Alliance. Cambridge, MA: Mathematica Policy Research, January 14, 2011.
- McLaughlin, Catherine, David Jones, Morris Hamilton, Angela Merrill, and Sandi Nelson. "Medicare Beneficiary Enrollment into and Disenrollment out of Medicare Advantage Plans." Submitted to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services. Ann Arbor, MI: Mathematica Policy Research, November 30, 2010.
- Jones, David, and Deborah Chollet. "Projected Health Care Spending in Minnesota." Final report submitted to the Minnesota Department of Health, Health Economics Program. Washington, DC: Mathematica Policy Research, July 26, 2010.
- Jones, David, and Margo Rosenbach. "Changes in Cigarette Prices in Massachusetts Following State and Federal Cigarette Excise Tax Increases." Submitted to the Massachusetts Department of Public Health, Massachusetts Tobacco Control Program. Cambridge, MA: Mathematica Policy Research, February 2010.

McLaughlin, Catherine G., David Jones, Timothy Lake, Angela Merrill, Morris Hamilton, and Sandra Nelson. "Medicare Beneficiary Enrollment into and Disenrollment out of Medicare Advantage Plans." Submitted to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services. Ann Arbor, MI: Mathematica Policy Research, October 2009.

Jones, David, Margo Rosenbach, and James Mulligan. "Effect of the 2008 Massachusetts Cigarette Excise Tax Increase on Cigarette Prices and Advertising Practices." Submitted to the Massachusetts Department of Public Health, Massachusetts Tobacco Control Program. Cambridge, MA: Mathematica Policy Research, March 2009.

Rosenbach, Margo, Shanna Shulman, David Jones, Michaela Morzuch, and Victoria Perez. "Toward Health System Change in the Mississippi Delta: Evaluation of the Delta Health Initiative." Submitted to the Delta Health Alliance. Cambridge, MA: Mathematica Policy Research, November 3, 2008.

Jones, David, and Deborah Chollet. "Establishing Health Care Spending Projections in Minnesota." Final report submitted to the Minnesota Department of Health, Health Economics Program. Cambridge, MA: Mathematica Policy Research, June 2008.

Angeles, Gustavo, Peter Lance, and David J. Jones. "How Do Economic Crises Affect Access to Health Care? An Analysis of the Evolving Distribution of Health Insurance Coverage During the Indonesian Financial Crisis." Unpublished manuscript, 2007.

Jones, David. "Measuring the Impact of Public Health Insurance Eligibility (Medicaid and SCHIP) on Preventive Care in Children." Doctoral dissertation chapter. Chapel Hill, NC: University of North Carolina at Chapel Hill, 2007.

## Presentations

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Jones, David, John Cawley, and David Frisvold. "The Impact of Sugar-Sweetened Beverage Taxes on Purchases: Evidence from Four City-Level Taxes in the U.S." Association for Public Policy Analysis & Management Fall Research Conference, Denver, CO, November 7, 2019.

Frisvold, David, John Cawley, Anna Hill, and David Jones. "Oakland's Sugar-Sweetened Beverage Tax: Impacts on Prices, Purchases, and Consumption by Adults and Children." Association for Public Policy Analysis & Management Fall Research Conference, Denver, CO, November 7, 2019.

Jones, David, and David Frisvold. "Findings from the Multi-City Evaluation of Sugar-Sweetened Beverage Taxes." Presentation to the Robert Wood Johnson Foundation, Princeton, NJ, August 1, 2019.

Hill, Anna, John Cawley, David Frisvold, and David Jones. "Multi-City Evaluation of Sugar-Sweetened Beverage Taxes: Findings from Philadelphia." Presentation to the American Society of Health Economists Annual Conference, Washington, D.C., June 26, 2019.

Jones, David, John Cawley, David Frisvold, and Anna Hill. "Multi-City Evaluation of Sugar-Sweetened Beverage Taxes: Findings from Philadelphia." Robert Wood Johnson Foundation Health Eating Research Annual Meeting 2019, Detroit, MI, March 14, 2019.

Rich, Eugene, David Jones, and Rachel Machta. "CHSP Initiative Overview and Progress to Date." Presentation to the Comparative Health System Performance Initiative Third Annual Technical Expert Panel Meeting, Rockville, MD, September 26, 2018.

Jones, David, John Cawley, David Frisvold, and Anna Hill. "The Impact of the Philadelphia Beverage Tax on Prices and Product Availability." Presentation to the American Society of Health Economists Annual Conference, Atlanta, June 12, 2018.

Jones, David, and David Frisvold. "Multi-City Evaluation of Sugar-Sweetened Beverage Taxes: Findings from Philadelphia." Presentation to the Robert Wood Johnson Foundation, Princeton, NJ, May 30, 2018.



Furukawa, Mike, and David Jones. "Compendium of U.S. Health Systems: Strategies and Opportunities." Presentation to the Comparative Health System Performance Initiative Second Annual Technical Expert Panel Meeting, Rockville, MD, October 26, 2017.

Rich, Eugene, and David Jones. "Identifying and Describing Health Systems Using Secondary Data Sources: Findings and Key Challenges." Presentation to the Comparative Health System Performance Initiative Second Annual Grantee Workshop, Rockville, MD, September 14, 2017.

Jones, David, and Aparna Keshaviah. "Marijuana Baseline Health Study: Economic Impacts." Presentation to the Massachusetts Executive Office for Administration and Finance, Boston, May 4, 2017.

Jones, David, and Mariel Finucane. "Hospital-Acquired Condition Reduction Program Scoring Methodology Reevaluation." Presentation to the Technical Expert Panel, Cambridge, MA, December 11, 2015.

Jones, David, and Mariel Finucane. "Hospital-Acquired Condition Reduction Program Scoring Methodology Reevaluation: Technical Expert Panel." Presenter and Moderator. Under contract with the Centers for Medicare & Medicaid Services. Cambridge, October 19 and 20, 2015.

Jones, David, Qi Chen, Alex Bohl, and Sheng Wang. "Improving the AHRQ Quality Indicators: Overview of Findings for Safety Net Hospitals." Presentation to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality; Office of the Assistant Secretary for Planning and Evaluation; and Centers for Medicare & Medicaid Services, Baltimore, December 16, 2014.

Jones, David, Qi Chen, Alex Bohl, and Sheng Wang. "Improving the AHRQ Quality Indicators: Overview of Analysis and Findings." Presentation to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality, and Centers for Medicare & Medicaid Services, Baltimore, December, 8 2014.

Jones, David, Qi Chen, Alex Bohl, and Sheng Wang. "Improving the AHRQ Quality Indicators: Overview of Analysis and Findings." Presentation to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality, Baltimore, September 22, 2014.

Wang, S., A. Bohl, H. Hambridge, F. Yoon, and D. Jones. "The Impact of Misspecified Prior Distributions in Hospital Profiling under an Empirical Bayes Framework." Presentation to the Joint Statistical Meetings, Boston, August 5, 2014.

Jones, David, and So O'Neil. "National WISEWOMAN Evaluation." Presentation to the U.S. Department of Health and Human Services, Centers for Disease Control and Prevention, Atlanta, July 30, 2014.

Jones, David, Alex Bohl, and Frank Yoon. "Improving the AHRQ Quality Indicators: Recommending and Testing Modifications to the QI Methods." Presentation to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality, Baltimore, May 1, 2014.

O'Neil, So, and David Jones. "Proposed Evaluation Design for the Transformed Healthy Start Program." Presentation to the U.S. Department of Health and Human Services, Health Resources and Services Administration, Rockville, MD, March 18, 2014.

Jones, David, and Catherine McLaughlin. "Medicare Beneficiary Enrollment into and Disenrollment out of Medicare Advantage Plans." Presentation to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services, Baltimore, January 30, 2014.

Jones, David, Sam Stalley, Jessica Ross, Alex Bohl, and Dmitriy Poznyak. "Improving the AHRQ Quality Indicators: Findings from Exploratory Data Analyses." Presentation to the U.S. Department of Health and Human Services, Agency for Healthcare Research and Quality, Baltimore, December 12, 2013.

Bohl, A.A., D. Jones, D. Poznyak, J. Ross, E. Schone, F. Yoon, and J. Zickafoose. "Hospital Peer Groups, Reliability, and Stabilization: Shrinking to the Right Mean." Panel presented at the Federal Committee at the Statistical Methodology Meeting, Washington, DC, November 2013.

Schone, E.A. Bohl, D. Jones, D. Poznyak, J. Ross, S. Stalley, F. Yoon, and J. Zickafoose. "Variation in Quality by Hospital Characteristics: True or False?" Panel presented at the Federal Committee at the Statistical Methodology Meeting, Washington, DC, November 2013.

Yoon, F., A. Bohl, D. Jones, D. Poznyak, J. Ross, E. Schone, S. Stalley, and J. Zickafoose. "The Role of Hospital Characteristics in Setting the Appropriate Yardstick in Hospital Profiling." Presented at the Federal Committee on Statistical Methodology Research Conference, Washington, DC, November 2013.

Jones, David, and Bob Schmitz. "Study of Access and Quality of Care in For-Profit PACE." Presentation to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services, Baltimore, September 3, 2013.

Bohl, A.A., D. Jones, D. Poznyak, J. Ross, E. Schone, F. Yoon, and J. Zickafoose. "Hospital Peer Groups, Reliability, and Stabilization: Shrinking to the Right Mean." Presented at the Joint Statistical Meetings, Montreal, August 2013.

Schone, Eric, A. Bohl, D. Jones, D. Poznyak, J. Ross, F. Yoon, and J. Zickafoose. "Alternative Weighting Schemes for the AHRQ QI Composites." Presented at the Joint Statistical Meetings, Montreal, August 2013.

Yoon, Frank, A. Bohl, D. Jones, D. Poznyak, J. Ross, R. Schone, J. Zickafoose, and D. Ayele. "The Role of Hospital Characteristics in Setting the Appropriate Yardstick in Hospital Profiling." Presented at the Joint Statistical Meetings, American Statistical Association, Montreal, August 2013.

Jones, David. "Variation in Quality by Hospital Characteristics: True or False?" Presented at the Joint Statistical Meetings, American Statistical Association, Montreal, August 4, 2013.

Jones, David, and Catherine McLaughlin. "Medicare Advantage Enrollees: A Study of Coverage Choices by the 2007 Cohort from 2007-2011." Presentation to the U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services, Baltimore, December 20, 2012.

Jones, David, Jessica Ross, and Lei Rao. "Do Low Socioeconomic and High Minority Populations Have Lower Geographic Access to High Quality Inpatient Hospital Care?" Presented at the AcademyHealth Annual Research Meeting, Orlando, FL, June 2012.

Bohl, Alex, Matt Sweeney, and David Jones. "Impact of Truncation of Diagnoses on AHRQ Quality Measures." Presented at the AcademyHealth Annual Research Meeting, Orlando, FL, June 2012.

Schone, Eric, Mai Hubbard, and David Jones. "Reliability of Inpatient Quality Measures: Implications for Public Use." Presented at the AcademyHealth Annual Research Meeting, Orlando, FL, June 2012.

Jones, David, Jessica Ross, and Lei Rao. "Geographic Access to Quality Inpatient Hospital Care in the Medicare Population by Local Area Characteristics." CMS QualityNet Conference, Baltimore, December 15, 2011.

Mabli, James, and David Jones. "Food Security and Access to Retail Food Establishments Among Emergency Food Program Recipients." U.S. Department of Agriculture, Economic Research Service, Washington, DC, November 17, 2011.

McLaughlin, Catherine, and David Jones. "Medicare Beneficiary Enrollment into and Disenrollment out of Medicare Advantage Plans, 2010." U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services, April 14, 2011.

McLaughlin, Catherine, and David Jones. "Medicare Beneficiary Enrollment into and Disenrollment out of Medicare Advantage Plans, 2011." U.S. Department of Health and Human Services, Centers for Medicare & Medicaid Services, Baltimore, March 1, 2011.

Jones, David. "Primary Prevention and Health Outcomes: Treatment of Residential Lead-Based Paint Hazards and the Incidence of Childhood Lead Poisoning." Triangle Health Economics Workshop, Chapel Hill, NC, 2007.

Jones, David. "Primary Prevention and Health Outcomes: Treatment of Residential Lead-Based Paint Hazards and the Incidence of Childhood Lead Poisoning." Applied Micro Graduate Student Workshop, Chapel Hill, NC, 2007.

## Professional Affiliations

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AcademyHealth; Advisory Committee Member for the Health Economics Interest Group  
American Economic Association  
American Statistical Association  
American Society of Health Economists

## Referee

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*Economics and Human Biology*

*Food Policy*

*Health Services Research*

*International Journal of Environmental and Public Health*

*Quarterly Journal of Economics*

## Information Technology

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Stata, SAS, Fortran, LaTeX, ArcGIS

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## Dana Petersen

Senior Researcher

### Experience

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#### Mathematica

**Co-Practice Lead, Evaluation of the Comprehensive Primary Care Plus (CPC+) Initiative (2018-).**

Provide leadership on the implementation study of a random sample of practice participating in CPC+ and on a special study of drivers of reduced hospitalization rates among a sample of exemplar practices. Responsibilities include developing data collection protocols, collecting and analyzing data, training practice team members, and writing reports. CPC+, a multipayer initiative led by Centers for Medicare & Medicaid Services (CMS), aims to transform the quality and cost of care provided by thousands of primary care practices spread over 18 regions.

**Principle Investigator, Multi-City Sugar-Sweetened Beverage (SSB) Tax Evaluation (2018-10).** Oversaw the qualitative data collection and analysis of study of business owners' experiences implementing a sugar-sweetened beverage tax in Philadelphia, PA and Oakland, CA. Provided technical guidance on study design, sampling and recruitment, interview protocol development, data collection, and analysis. Co-authored an issue brief to summarize findings from interviews. The Robert Wood Johnson Foundation is funding this study of the impacts of sugar-sweetened beverage taxes on beverage purchase and consumption behavior of families with children.

**Task Lead, Accountable Health Communities (AHC) Model Implementation, Learning System and Technical Assistance (2017-).** Oversee the design and implementation of technical assistance site visits to bridge organizations participating in the Center for Medicare & Medicaid Innovation's AHC Model. The purpose of the site visits is to provide technical assistance to bridge organizations to help them build on their strengths and overcome barriers to implementation progress. Led the development, administration, and analysis of the baseline learning needs assessment survey of bridge organizations. The AHC Model aims to address the gap in clinical care and community services by identifying and addressing the health-related social needs of Medicare and Medicaid beneficiaries.

**Primary and Preventive Care Group Lead, Evaluation of Health Care Innovation Awards Round 2 (2016-).** Lead the implementation evaluation for eight programs that aim to improve care for people who need primary or preventive care, including oral health care and family planning services. Oversee analytic coding for all awardees. The overall evaluation focuses on 39 programs implemented by Centers for Medicare & Medicaid Services (CMS) awardees to achieve better quality of care, improve population health, and lower costs through improvement of the care delivery processes for Medicare, Medicaid, and Children's Health Insurance Program (CHIP) beneficiaries.

### Education

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**2008** Ph.D., Health Services and Policy Analysis, University of California, Berkeley

**1998** M.P.H., Health Policy, University of California, Los Angeles

**1997** M.A., Anthropology, University of California, Santa Barbara

**1992** B.A., Anthropology and Environmental Studies, Hobart and William Smith Colleges

### Positions

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**2011-** Mathematica

**2014-** Senior Researcher

**2011-2014** Researcher

**1999-2011** Research Social Scientist, SRI International

**2004-2005** Participatory Research Team Member, University of California

**1998** Intern, Centers for Disease Control and Prevention

**1997-1998** Policy Advocate and Health Educator, Community Partners

**1994** Program Evaluator, Plan International

**1993** Program Evaluator, International Charities

**Researcher, Continuation of the National Evaluation of the Children's Health Insurance Program Reauthorization Act of 2009 Quality Demonstration Grant Program (2015-2017).** Developed or updated products summarizing findings from states' efforts. Supported technical assistance activities transferring learning from demonstration activities to non-demonstration states. This contract is continuing an evaluation funded by the Agency for Healthcare Research and Quality of demonstration projects in 18 states funded by CMS that use a variety of approaches to improve the quality of health care for children enrolled in Medicaid and CHIP.

**Principal Investigator, Study of Children's Physical Activity in Colorado (2015-2016).** Led the qualitative data collection and analysis components for a study to assess perceptions of barriers and opportunities for children to participate in physical activity during out-of-school time among children and caregivers living in low-income communities in Colorado. Led development of interview and focus group protocols, staff training for data collection, and analysis. Participated in the development of a final report for the Colorado Health Foundation. The findings from this study helped the Foundation identify programs and projects to fund throughout the state to promote children's physical activity.

**Qualitative Lead, Changing Opioid Prescribing Electronic Health Record (EHR) Defaults, Building Analytic Capacity for Policy Analysis and Decision-Making (2015-2016).** Oversaw the qualitative aspects of the project including developing focus group protocol, training staff on focus group data collection and analysis, analyzing data, and contributing to report writing.

**Project Director, Family Engagement in Early Math (2015-2016).** Designed and directed a process evaluation and an evaluability assessment of six grantees funded by the Heising-Simons Foundation to develop and integrate early math education components within existing promising programs for low-income families with young children. The project included qualitative data collection, including a literature review, telephone interviews, and site visits, and examination of grantees' own process and outcome data. Deliverables informed the Foundation's internal decision making, identified and shared lessons with the field, and contributed to the national dialogue about effective strategies for building children's early math skills.

**Project Director, Evaluation of the Family Engagement Impact Project (FEIP) (2013-2016).** Provided project management and substantive support for the evaluation of the Heising-Simons Foundation's FEIP initiative. The FEIP aims to improve developmental and educational outcomes for low-income immigrant children in two California counties through increased family engagement. The evaluation focused on how the FEIP is implemented across grantee sites and measured the influence of the FEIP on parents, children, and organizational outcomes. The evaluation included both an implementation study and a comparison group design outcomes study.

**Task Leader, Finish Line Case Studies (2015-2016).** Led the development of a case study on low-income children's health insurance coverage and service delivery in California for the David and Lucile Packard Foundation. Coordinated with a Mathematica team that is conducting similar case studies in Colorado and Texas, with additional funding from The Colorado Health Foundation. The project involved in-depth interviews with a range of children's health stakeholders in California including staff at child advocacy organizations, local health departments, managed care plans, federally qualified health centers, and children's hospitals to identify emerging positive and negative trends in access to care for low-income children and to assess the changing landscape of coverage and care for low-income children due to Affordable Care Act (ACA) implementation and other influences in the state.

**Project Director, Evaluation of the U.S. Department of Health and Human Services (DHHS) Action Plan to Reduce Racial and Ethnic Health Disparities (2012-2016).** Provided project management and led development and implementation of a comprehensive assessment of the Action Plan and oversaw an assessment of the implementation of the National Culturally and Linguistically Appropriate Services (CLAS) Standards across DHHS. The Plan was designed to reduce racial and ethnic disparities in health outcomes by improving health care quality and access, building health workforce capacity, and advancing scientific knowledge and innovation. The Action Plan assessment included developing short- and long-term indicators of progress and impact, designing a data collection and monitoring system to track implementation and



outcomes of the Plan, and reviewing and analyzing current data collected by DHHS and participating agencies. The assessment of CLAS implementation efforts across DHHS included survey development and analysis, and key informant interviews. The project publicized key findings through public reports and scientific manuscripts.

**Qualitative Analyst, Health Care Innovation Awards Round 2 (2015).** Contributed to cross-site analyses to evaluate implementation of models to improve the quality of care and reduce total health care costs, and wrote sections of the annual report to CMS, Center for Medicare & Medicaid Innovation (CMMI). The project is funded by CMS and CMMI to evaluate 39 awardees' new models of care or payment and maximize what CMS will learn from the entire initiative to plot a path forward for authorizing and promoting effective, new service delivery and payment models, thereby generating improvements in quality of care and outcomes for as many Medicare, Medicaid, and CHIP beneficiaries as possible and reaping substantial cost savings to these public payers.

**Qualitative Team Leader, Evaluation of the Children's Health Insurance Program Reauthorization Act of 2009 Quality Demonstration Grant Program (2011-2015).** Led the project team for the qualitative aspects of a mixed-methods evaluation of promising ideas for improving the quality of health care for children enrolled in Medicaid or CHIP in 18 states. Co-led the collection of stakeholder input; the development of interview and focus group instruments to collect data from parents, physicians, and state Medicaid and CHIP staff; the design and implementation of site visits, including key informant interviews and focus groups with parents, to all demonstration states; and the development of the qualitative coding scheme and analysis plan. Contributed to the development of products to disseminate findings. With multiyear grants from CMS, state Medicaid or CHIP agencies will experiment with new measures of children's care quality, health information technology (health IT), provider-based models of service delivery, a model electronic health record, and other approaches to quality improvement. The evaluation is funded by the Agency for Healthcare Research and Quality (AHRQ).

**Deputy Project Director, Improving Patient Centered Medical Home (PCMH) Research, Evaluation, and Implementation (2013-2014).** Provided project management and substantive support on an AHRQ project that aims to strengthen primary care by providing information on how to implement, evaluate, and refine the PCMH, as well as how to effectively train practice facilitators. Led development of white paper and brief on strategies for keeping the patient and the center as primary care practices adopt team-based care and led the formative process and outcomes evaluation of the project's outreach and dissemination activities. Developed a case study of an exemplar practice facilitation training program. This project continues Mathematica's work in supporting AHRQ and federal partners to study, collaborate, and produce recommendations to facilitate the development and implementation of the PCMH or other ways to improve primary care. Project activities included developing white papers and briefs; developing training resources for primary care practice facilitators; disseminating information broadly through webinars, newsletters, listserves, social media outlets, a learning community of members interested in practice facilitation, and a federal collaborative of agencies and departments; and helping AHRQ redesign and maintain its PCMH portal.

**Task Leader, Center of Excellence in Research on Disability Services, Care Coordination, and Integration (2012-2013).** Led qualitative aspects of a study examining whether the formal recognition of pediatric practices by the National Committee for Quality Assurance as PCMHs is associated with higher quality care for children with disabilities and special health care needs. Selected samples, developed interview guides, conducted interviews, led analysis, and wrote reports and scientific manuscripts. The study included interviews with pediatricians and family physicians, parents of children with special health care needs receiving services from those providers, and leaders of consumer organizations supporting children with disabilities.

**Researcher, Study of California's Health-e-App Public Access (HeA PA) System (2011-2013).** Assisted with a study of California's online, self-service application for Healthy Families and Medi-Cal coverage during the first year of the tool's availability. The study compared application and enrollment via the new tool with other options, examined the strengths and weaknesses of HeA PA functionality, assessed the effects of an

online outreach campaign on HeA PA use, and identified lessons and potential improvements; including those related to the implementation of the ACA.

**Researcher, Learning Collaboratives to Support the Development of a High-Performing State Health Coverage Program (2011-2013).** Assisted with assessment of five learning collaboratives of state and federal officials to support the development of integrated and high-performing Medicaid and State Health Insurance Exchange systems that fulfill the requirements of the ACA. Data collection and analysis methods included observation, interviews, document review, and examination of attendance and web usage data. Each collaborative of six to eight states and CMS will focus on a different topic, such as expanding coverage, value-based purchasing, performance measurement, or health IT infrastructure, and will produce practical implementation tools and templates that other states may use as models. The project is funded by CMS.

**Researcher, Federal Facilitation of the Patient Centered Medical Home Model (2011-2012).** Oversaw the development of a series of white papers on novel and underused methods to evaluate and refine medical home models. Led data collection design for case studies of promising practice facilitation programs and authored one case study. Prepared weekly listserv communications on practice facilitation for AHRQ's website. This project supports the efforts of AHRQ and the federal government to develop the evidence base on the PCMH for researchers and policymakers. The case study focused on how a nationwide demonstration project used practice facilitation to support PCMH transformation among safety net primary care practices. The case study complements the manual on developing a practice facilitation program also developed by Mathematica.

### **SRI International; Menlo Park, CA**

As **Research Social Scientist (1999-2011)**, participated in the following projects:

**Codirector, First 5 San Mateo County Countywide System of Care Investments (2009-2011)**, designed and implemented evaluation of countywide system of care investments for families with children ages 0-5. Convened stakeholder groups to identify funding and data collection priorities. Developed data collection tools and processes, including intake forms, surveys, interviews, and case studies. Acted as liaison between grantees and First 5 San Mateo County commissioners and staff. Supported program improvement through continuous data quality monitoring and interpretation. Supervised staff and managed budget. Led report writing.

**Director, Club One's Feeding Your Kids (FYK) Program (2010)**, facilitated theory of change processes with program developers and key stakeholders to collaboratively define goals and short- and long-term outcomes. Developed design to evaluate the effectiveness of FYK, an internet-based behavior change intervention that provides parents with food and nutrition information, ideas, recipes, feeding tips, resources, and inspiration so that they and their children choose healthful foods and develop healthy eating habits.

**Director, First 5 San Mateo County Special Needs Project (2007-2010)**, designed and implemented evaluation of services for young children with disabilities and other special needs, including comprehensive screenings and support services. Conducted qualitative and quantitative data collection and analysis. Supervised staff and managed budget. Led report writing.

**Research Reviewer, What Works Clearinghouse, U.S. Department of Education, Institute of Education Sciences (2007-2010)**, served as a reviewer to identify high-quality, evidence-based research to determine the effectiveness of early learning interventions.

**Project Manager, Washington State Department of Early Learning (DEL) Kindergarten Readiness Assessment Planning Project (2008)**, summarized literature on current research and best practices. Designed and conducted focus groups and a statewide survey. Developed recommendations. Co-wrote report for Washington State Legislature.

**Focus Group Task Leader, Washington State Department of Early Learning Parent Needs Assessment (2008)**, designed and implemented eight special population focus groups to gather information to guide DEL's future work on improving early learning opportunities and systems. Led qualitative data analysis tasks. Wrote focus group summary report.



**Research Assistant, Ready Schools Florida (RSF) (2008)**, conducted site visits and interviews with RSF partners, early care and education program staff, and elementary school staff about their experiences and participation with RSF program services and supports. Tracked longitudinal data on children's outcomes in Miami Dade County.

**Technical Assistance Coordinator, First 5 California Statewide Evaluation (2002-2004)**, supervised team of 20 technical assistance coaches. Trained coaching staff to provide data collection technical assistance. Developed and delivered regional and statewide technical assistance and capacity building trainings for funded programs. Directed weekly staff meetings and reviewed and analyzed coach logs and reports. Co-wrote reports for California State Legislature.

**Community Planning Specialist, James Irvine Foundation's Communities Organizing Resources to Advance Learning Initiative (2002-2003)**, evaluated foundation's community planning process. Supported foundation and communities in defining outcomes. Designed research protocol and data collection tools. Assisted in data analysis and report writing. Made presentations to foundation and community grantees.

**Evaluation Technical Assistance Provider and Site Liaison, Sierra Health Foundation's Community Partnerships for Healthy Children Initiative (1999-2003)**, provided technical assistance to grantees on selection of indicators, data collection, analysis, and report writing. Collected cross-community data on community-based collaborations and health outcomes through surveys, interviews, site visits, and secondary databases. Analyzed qualitative and quantitative data. Wrote reports. Made presentations to foundation, to community grantees, and at conferences.

### University of California; Berkeley, CA

As **Participatory Research Team Member (2004-2005)**, conducted literature reviews. Coded and analyzed case study interview transcripts. Produced case study write-ups. Authored and coauthored publications. This W.K. Kellogg Foundation-funded study examined the impact of community-based participatory research on health-promoting public policy.

### Centers for Disease Control and Prevention (CDC); Atlanta, GA

As **Intern (1998)** for the Community Assistance and National Partnership Branch, assessed technical assistance needs of CDC staff and national HIV prevention partners, evaluated the branch's grant-making process and applicant characteristics, and made recommendations for improvement. Conducted interviews and focus groups. Developed, administered, and analyzed quantitative telephone survey of grantees.

### Community Partners; Los Angeles, CA

As **Policy Advocate and Health Educator (1997-1998)**, educated bar management about California's Smoke-Free Bar Law (AB3037). Provided technical assistance regarding implementation of AB3037. Documented economic and social effects of law via site visits and interviews.

### Plan International; Guayaquil, Ecuador

As **Program Evaluator (1994)**, assessed health status and utilization of health services in two Ecuadorian communities, designed survey instrument, trained community health workers, and oversaw administration of household surveys in Spanish. Analyzed results. Wrote report and presented findings to funding agency.

### International Charities; La Romana, Dominican Republic

As **Program Evaluator (1993)**, evaluated early implementation of community-based maternal and child health program for disenfranchised Haitian sugar cane workers in the Dominican Republic. Conducted community health workshops on nutrition and child health in Spanish. Translated for American physicians during mobile clinic tours.

## Papers and Publications

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### PEER-REVIEWED PUBLICATIONS

Zivin, Kara, Jessica O. White, Sandra Chao, Anna L. Christensen, Luke Horner, Dana M. Petersen, Morgan R. Hobbs, Grace Capreol, Keven A. Halbritter, and Christopher M. Jones. "Implementing Electronic Health Record Default Settings to Reduce Opioid Overprescribing: A Pilot Study." *Pain Medicine*, January 9, 2018. doi:10.1093/pm/pnx304.

Finkelstein, Daniel M., Dana M. Petersen, and Lisa S. Schottenfeld. "Promoting Children's Physical Activity in Low-Income Communities in Colorado: What Are the Barriers and Opportunities?" *Preventing Chronic Disease*, vol. 14, 2017.

Christensen, A., D. Petersen, R. Burton, V. Forsberg, and K. Devers. "What Factors Influence States' Capacity to Report Children's Health Care Quality Measures? A Multiple-Case Study." *Maternal and Child Health Journal*, vol. 21, no. 1, 2017, pp. 187-198.

Petersen, D., J. Zickafoose, M. Hossain, and H. Ireys. "Physician Perspectives on Medical Home Recognition for Practice Transformation for Children." *Academic Pediatrics*, vol. 16, no. 4, 2016, pp. 373-380.

Dorsey, Rashida, Dana M. Petersen, and Lisa Schottenfeld. "The Department of Health and Human Services Action Plan to Reduce Racial and Ethnic Health Disparities: A Commentary on Data Needs to Monitor Progress Toward Health Equity." *Health Systems and Policy Research*, vol. 3, no. 4, November 2016.

Peikes, D., D. Petersen, and L. Schottenfeld. "Thought Leaders' Corner: What Role Should Patients and Family Members Play in the Actual Governance and Management of the Patient-Centered Medical Home?" *Medical Home News*, vol. 7, no. 9, September 2015, p. 10.

Meehen, D., K. Hebbeler, S. Cherner, and D.M. Petersen. "Community Building for Children's Health: Lessons from Community Partnerships for Healthy Children." *Foundation Review*, vol. 1, 2009, pp. 43-54.

Minkler, M., V. Breckwich Vasquez, M. Tajik, and D.M. Petersen. "Promoting Environmental Justice Through Community-Based Participatory Research: The Role of Community and Partnership Capacity." *Health Education and Behavior*, vol. 35, no. 1, 2008, pp. 119-37.

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Stewart, Kate, Dana Petersen, Joe Zickafoose, Beny Wu, Mynti Hossain, Lisa Schottenfeld, Caroline Massad Francis, Randall Brown, and Henry Ireys. “Children with Disabilities and Special Health Care Needs in NCQA-Recognized Patient-Centered Medical Homes: Health Care Utilization, Provider Perspectives and Parental Expectations, Executive Summary.” Washington, DC: U.S. Department of Health and Human Services, Office of the Assistant Secretary for Planning and Evaluation, Office of Disability, Aging, and Long-Term Care Policy, January 2014.

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Petersen, D., E.F. Taylor, and K. Geonnotti. “Case Studies of Leading Primary Care Practice Facilitation Programs. Program Snapshot: The Safety Net Medical Home Initiative.” AHRQ publication no. 13-0010-4-EF. Rockville, MD: Agency for Healthcare Research and Quality, January 2013.

## Presentations

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Petersen, Dana, Jay Crosson, Tricia Collins Higgins, Lyndee Knox, Deborah Peikes, Erin Fries Taylor, Lisa Schottenfeld, and Elizabeth Babalola. “Primary Care Practice Facilitation in Three Established Training Programs.” Presentation at the North American Primary Care Research Group Annual Meeting, New York, November 25, 2014.

Petersen, Dana, Todd Gilmer, and Michael Harrison. “Advanced Methods in Delivery System Research—Planning, Executing, Analyzing, and Reporting Research on Delivery System Improvement Webinar No. 3: Logic Models.” Sponsored by the AHRQ Delivery System Initiative, June 4, 2013.

Stewart, Kate, Henry Ireys, Dana Petersen, Joe Zickafoose, and Lisa Schottenfeld. “Relationship Between NCQA Medical Home Recognition and Health Care Utilization Among Children in Medicaid with Disabilities or Special Health Care Needs.” Presentation at the Center of Excellence on Disability Research Conference, Crystal City, VA, March 11, 2013.

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## Support

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## Michela Garber

### Survey Research Associate

#### Experience

##### Mathematica

**Survey Associate, Evaluation of Oakland Unite Services (2019-).** Schedule, draft outreach protocol for, and participate in site visits and additional stakeholder interviews with community organizations that operate under Oakland Unite's Outreach to Commercially Sexually Exploited Children (CSEC) strategy. Draft text for the CSEC strategy report on the relevant California policy landscape. Schedule and attend stakeholder and participant focus groups - either to lead discussion or take and synthesize detailed notes - for the Life Coaching strategy evaluation. Synthesize themes and draft memo text on life coaching program experiences.

Oakland Unite is a publicly funded initiative in Oakland, California that seeks to interrupt and prevent violence by investing in collaborative strategies that focus on youth and young adults at the highest risk of violence. Mathematica's evaluation involves annual evaluations of the programs and strategies funded by Oakland Unite and a four-year comprehensive evaluation of the impact of participation on individual criminal justice, education, and employment outcomes.

**Survey Associate, School Nutrition and Meal Cost Study-II (SNMCS-II) (2019-).** Lead survey development, training, and field management activities for the School Nutrition Manager (SNM) Cost Survey, one of multiple survey instruments used to collect school-level data on the cost of school meals. Recruit School Food Authorities (SFAs) to participate in SNMCS-II, specifically co-leading recruitment from Alaska SFAs for the Outlying Areas Cost Study. Recruitment involves organizing SFA and school data collection, contracts, and logistics for 10-15 SFAs. Conduct school-level cost surveys for various schools throughout Spring 2020. SNMCS-II will obtain detailed information about how school food authorities and schools are implementing the changes of the Healthy, Hunger-Free Kids Act of 2010, and how these changes have affected school food service operations; school meal cost and quality; and students' diets, school meal participation, and satisfaction.

**Survey Associate, State and Local Implementation of the Individuals with Disabilities Education Act (IDEA) (2019-).** Draft outreach materials, schedule, and participate in cognitive pre-test debriefs on four out of six survey instruments, and summarize pre-test feedback in Round 1 memorandum, among other survey development, data collection management, and data quality review. Mathematica is contracted by the Institute of Education Sciences to plan, collect, and analyze survey data from states, school districts, and schools to evaluate the implementation of academic instruction, intervention, and supports for students with Individualized Education Programs and other children who are eligible for services under the IDEA.

**Survey Associate, Partnership for Social and Emotional Learning Initiative (PSELI) (2019).** Acted as community liaison between Mathematica and the Palm Beach County school district, as well as the on-site coordinators at 14 elementary schools, to create data collection schedules, ensure technology readiness, and answer questions about the administration of SELweb, the Initiative's online social and emotional learning assessment. Co-led on-site training for 25 field staff, monitored assessment progress, and led debrief with the district following data collection. Generated regular client reports and data cleaning for all six PSELI school districts.

##### Education

**2018** B.A., Sociology and Media Studies, University of California, Berkeley

##### Positions

**2019-** Mathematica

**2017-2018** Housing Solutions Intern, Hamilton Families

**2017, 2018** Residential Counselor, Stanford University

### **Hamilton Families; Oakland, CA**

As **Housing Solutions Intern (2017-2018)**, planned and conducted in-person and telephone interviews with participants—families who were experiencing or at risk of homelessness in San Francisco County—to identify how Hamilton Families might improve its rapid rehousing strategies and case management services, especially for those placed in out-of-county housing, who face extra barriers when removed from previous county social and resource support networks. Compiled affordable housing, holiday assistance, and summer childcare resources lists for out-of-county families.

### **Stanford University; Stanford, CA**

As **Residential Counselor (2017, 2018)**, led discussion sections for high school participants in media studies and sociology courses. Supported instructional staff and assisted with arrival and departure days. Worked on a team to ensure participant safety and build strong, healthy residential learning communities—through recreational, academic, and mentorship activities—to foster participants' growth and cultural humility.

# Tori Ehrhardt

## Research Associate

### Experience

#### Mathematica

**Project Manager, School Nutrition and Meal Cost Study: Secondary Analyses and Manuscripts (2020-).** Assist with project start-up, prepare monthly expenditure analysis, monitor project budget, review and approve invoices to client, and draft internal project review memos and external client memos with assistance from deputy project director. Funded by Duke University's Healthy Eating Research Program, Mathematica staff will prepare five papers for inclusion in a special supplement to *Nutrients*, a peer-reviewed journal.

**Research Associate, Evaluation of Behavioral Interventions in Labor Programs (2019-).** Take accurate notes during complex meetings with the project team and employees of the U.S. Department of Labor's (DOL's) Chief Evaluation Office (CEO). Funded by the U.S. Department of Labor's (DOL's) Chief Evaluation Office (CEO), this project seeks to apply behaviorally informed strategies across a host of DOL agencies, including the Office of Unemployment Insurance (OUI), the Office of Federal Contract Compliance Programs (OFCCP), Wage and Hour Division (WHD), and the Office of Workforce Investment (OWI).

**Research Associate, School Meals Operations Study (2019-).** Contributed to the development of recruitment materials, including advance letters and emails, web-survey invitations, a study brochure, and postcard. Lead the development of the pretest outreach materials. Lead calls with School Food Authority Directors and Child Nutrition Directors to solicit feedback on survey instruments. Draft sections of the Office of Management and Budget (OMB) supporting statements and completed the burden table with minimal oversight. Complete web-survey testing to improve the quality and reduce the administrative burden of survey instruments. Funded by the U.S. Department of Agriculture (USDA), Food and Nutrition Service (FNS), this project seeks to support the ongoing evaluation of the school-based FNS Child Nutrition Programs including, but not limited to, the National School Lunch Program, the School Breakfast Program, and the Fresh Fruit and Vegetable Program.

**Research Associate, Next Generation of Enhanced Employment Strategies (2019-).** Help test the Random Assignment, Participant Tracking, Enrollment and Reporting (RAPTER®) system to enroll, randomly assign, and track participants. Add programming instructions, edit logic and language, and instrument specifications for programmers. Contributed to the first draft of the HML IRB Approval of Research Protocol. Funded by the Office of Planning, Research, and Evaluation, this project seeks to identify, and test innovative, promising employment interventions designed to help people facing complex challenges secure a pathway toward economic independence.

**Survey Associate and Recruiter, School Nutrition and Meal Cost Study-II (SNMCS-II) (2019-).** Contribute to the testing and revision of the parent survey instrument. Report and track programming issues in Jira. Coordinated approval for modifications to the Memorandum of Understanding for participating school districts and acted as a liaison between Mathematica's legal team and project recruiters. Revised recruitment materials for ease of use by school district staff. Recruit School Food Authorities (SFAs) to participate in SNMCS-II. Organize SFA and school data collection, contracts, and logistics for 20-25 SFAs. SNMCS-II will obtain detailed information about how SFAs and schools are implementing the changes of the

#### Education

**2019** B.S., Psychology, University of North Carolina at Chapel Hill

**2019** B.A., Biology, University of North Carolina at Chapel Hill

#### Positions

**2019-** Mathematica

**2016-2019** University of North Carolina

**2018-2019** Co-founder and Community Project Director

**2018-2019** Research Assistant

**2016-2017** Administrative Assistant

Healthy, Hunger-Free Kids Act of 2010, and how these changes have affected school food service operations; school meal cost and quality; and students' diets, school meal participation, and satisfaction.

### University of North Carolina; Chapel Hill, NC

As **Research Assistant (2018-2019)** in the Department of Psychiatry, headed a team of undergraduate researchers to examine the healthy migrant paradox with respect to postpartum depression. Created conceptual model, conducted literature reviews, and performed logistic regressions on large data sets using Stata. Managed, cleaned, and updated research databases and input participant data in REDCap. Administered the Trier Social Stress Test to participants to measure stress reactivity on the development of postpartum depression and anxiety.

As **Administrative Assistant (2016-2017)** in the Gillings School of Global Public Health, Department of Maternal and Child Health, researched and tracked news coverage of school of public health faculty, academic articles, and news mentions to provide feedback on performance for management. Supported event planning and execution for academic lectures, workshops, fundraisers, and symposiums.

### Leadership Experience

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2018-2019      Co-founder and Community Project Director, United Against Inequities in Disease, University of North Carolina at Chapel Hill

### Honors and Awards

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2018-2019      Epsilon Eta Environmental Honors Fraternity  
2016-2019      Alpha Epsilon Delta National Health Preprofessional Honor Society  
2015-2019      Carolina Covenant Scholar, University of North Carolina at Chapel Hill  
2017            Leonard G. and Rozelia S. Herring Award, University of North Carolina at Chapel Hill

### Information Technology

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Stata, SPSS, TypeScript, Qualtrics, REDCap, Google Suite, Salesforce

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