

# CURRICULUM VITAE

June 18, 2018

KEVIN ALAN SCHULMAN, MD, MBA

## EDUCATION

1983	BA	Dartmouth College
1988	MD	New York University School of Medicine
1988	MBA	The Wharton School of the University of Pennsylvania (concentration in health care management)

## POSTGRADUATE TRAINING

1988-1989	Internship in Internal Medicine, Department of Medicine, Hospital of the University of Pennsylvania (Chair: Larry Early, MD)
1989-1991	Residency in Internal Medicine, Department of Medicine, Hospital of the University of Pennsylvania (Chairs: Larry Early, MD, and John M. Eisenberg, MD)

## CURRENT PROFESSIONAL POSITIONS AND APPOINTMENTS

2018-	Professor Of Medicine, Stanford University School of Medicine
2018-	Professor Of Economics (By Courtesy), Graduate School Of Business, Stanford University
2018-	Associate Chair of Business Development And Strategy, Department Of Medicine, Stanford University
2018-	Director Of Industry Partnerships And Education For The Clinical Excellence Research Center (CERC), Stanford University School Of Medicine

## PREVIOUS PROFESSIONAL POSITIONS AND APPOINTMENTS

1989-1991	Assistant Instructor of Medicine, University of Pennsylvania School of Medicine
1991-1992	Instructor of Medicine, University of Pennsylvania School of Medicine
1991-1992	Senior Fellow, Leonard Davis Institute of Health Economics, University of Pennsylvania
1992-1993	Medical Director, Clinical Economics Research Unit, Department of Medicine, Georgetown University School of Medicine
1992-1997	Assistant Professor of Medicine, Georgetown University School of Medicine
1992-1999	Program Faculty, Graduate Public Policy Institute, Georgetown University
1992-1999	Fellowship Director, Division of General Internal Medicine, Department of Medicine, Georgetown University School of Medicine
1993-1999	Director, Clinical Economics Research Unit, Department of Medicine, Georgetown University School of Medicine
1997-1999	Associate Professor of Medicine, Georgetown University School of Medicine
1999-2001	Associate Professor of Medicine, Duke University School of Medicine
2000-2013	Director, Health Sector Management Program, The Fuqua School of Business, Duke University
2000-2013	Director, Center for the Study of Health Management, The Fuqua School of Business, Duke University
2000-2001	Adjunct Associate Professor of Business Administration, The Fuqua School of Business, Duke University
2000-2004	Director, MD/MBA Program, Duke University School of Medicine
2001	Associate Professor of Business Administration, The Fuqua School of Business, Duke University
2003-2006	Vice-Chairperson for Business Affairs, Department of Medicine, Duke University School of Medicine
2000-2008	Affiliated Faculty, Center for Clinical Health Policy Research, Duke University School of Medicine
2008-2010	Senior Fellow in Clinical Health Policy, Duke Center for Clinical Health Policy, Duke University
2001-2010	Professor of Business Administration, The Fuqua School of Business, Duke University
2007-2016	Executive Committee, Duke Global Health Institute, Duke University
2013	Visiting Professor in General Management, Harvard Business School, Boston, MA
2014-2016	Visiting Professor in General Management, Harvard Business School, Boston, MA
2010-2016	Gregory Mario and Jeremy Mario Professor of Business Administration, Duke University
2001-2018	Professor of Medicine, Duke University School of Medicine

1999-2018 Director, Center for Clinical and Genetic Economics, Duke Clinical Research Institute, Duke University School of Medicine  
 1999-2018 Research Associate, Center for Health Services Research in Primary Care, Durham VA Medical Center  
 2000-2018 Faculty Associate, Trent Center for Bioethics, Humanities and History of Medicine, Duke University  
 2007-2018 Associate Director, Duke Clinical Research Institute, Duke University School of Medicine  
 2009-2018 Founding Director, Masters of Management in Clinical informatics, Duke University.  
 2011-2018 National Guest Scholar. Stanford Clinical Excellence Research Center (CERC). Stanford University School of Medicine  
 2015-2018 Faculty Governance Committee, Duke Science and Society Initiative. Duke University.  
 2016-2018 Visiting Scholar, Harvard Business School, Boston, MA  
 2016-2018 Gregory Mario and Jeremy Mario Professor, Duke University

AWARDS, HONORS, AND MEMBERSHIPS IN HONORARY SOCIETIES

1983 Graduation *cum laude*, Dartmouth College  
 1988 Graduation with distinction, The Wharton School of the University of Pennsylvania  
 1990 Henry Christian Award (for outstanding abstract in a subspecialty field), American Federation for Clinical Research (now the American Federation for Medical Research)  
 1990 Associates Member Prize for Outstanding Scientific Presentation, Society of General Internal Medicine  
 1990 First Prize, Lee B. Lusted Student Prize (for outstanding presentation by a trainee), Society for Medical Decision Making  
 1995-1997 Faculty Development Award in Pharmacoeconomics, Pharmaceutical Research and Manufacturers of America Foundation  
 1999 Alice S. Hersh Young Investigator Award, Association for Health Services Research (now AcademyHealth)  
 2001 Dr. Herbert W. Nickens Epidemiology Award (inaugural recipient), Association of Black Cardiologists  
 2006 Elected Member, American Society for Clinical Investigation (ASCI)  
 2014-2015 Excellence in Teaching Award, Duke MMCi Program. Durham, NC.  
 2017 50@50 Notable People, Papers, and Events from the University of Pennsylvania Leonard Davis Institute's First Half-Century Award, for 1999 New England Journal of Medicine Article  
 2018 Elected to Membership, Association of American Physicians.

MEMBERSHIPS IN PROFESSIONAL AND SCIENTIFIC SOCIETIES

1989-present Society for Medical Decision Making  
 1995 Nominated for Trustee  
 1997-1999 Ideas Committee  
 1990-present American College of Physicians  
 1990-1992 Associate  
 1992-2010 Member  
 2010- Fellow  
 1990-present American Federation for Medical Research  
 1990-present Society for General Internal Medicine  
 1993-2001 Research Committee  
 1997-2001 Finance Committee  
 1997 Glaser Award Selection Committee  
 2001 Co-chair, Patient-Centered Abstracts Review Committee  
 2009-2011 Research Subcommittee of the Health Policy Committee  
 1991-present AcademyHealth  
 1996 Annual Research Meeting Planning Committee  
 1997 Annual Research Meeting Planning Committee  
 2001 Annual Research Meeting Planning Committee  
 2010-2013 Nominations Committee

1999-present International Society for Pharmacoeconomics and Outcomes Research  
2003 Program Chair, 8th Annual Meeting  
2005-2009 Awards Committee;  
Vice Chair 2009, Chair, 2010-2012  
2010 Candidate for President

2010- The Business School Alliance for Health Management (www.BAHM-Alliance.Org)  
2010- Founding President

#### UNIVERSITY SERVICE

1990-1991 Medical Board's Committee on Quality Assurance Data and Systems, Hospital of the University of Pennsylvania

1992-1993 Clinical Research Working Group, Department of Medicine, Georgetown University School of Medicine

1992-1994 Practice Operations Committee, Department of Medicine, Georgetown University School of Medicine

1992-1997 Billing Committee, Department of Medicine, Georgetown University School of Medicine

1993 Pharmaceutical Promotion and Costing Education Committee, Department of Medicine, Georgetown University School of Medicine

1993-1994 Patient Care Information System Committee, Department of Medicine, Georgetown University School of Medicine

1996-1997 Quality Improvement Committee, Department of Medicine, Georgetown University School of Medicine

1997 Cochair, Supply Chain Management Task Force, Georgetown University School of Medicine

1997 Ad hoc Committee on Public Health, Georgetown University School of Medicine

1997-1998 Director, Medicare Coordinated Care Demonstration Project, Georgetown University School of Medicine

1997-1998 Thursday Group (executive leadership forum), Georgetown University School of Medicine

1998-1999 Ad hoc Committee on Clinical Problem Solving and Decision Making, Georgetown University School of Medicine

1998-1999 Committee on Faculty, Georgetown University School of Medicine

2000-2002 CERTs Database Workgroup, Duke Clinical Research Institute, Duke University School of Medicine

2000-2002 CERTs Quality Workgroup, Duke Clinical Research Institute, Duke University School of Medicine

2000-2003 Leadership for Executives in the Health Professions, Continuing Medical Education, Duke University School of Medicine

2000 Education Committee for the Health Policy Certificate Program, Terry Sanford Institute of Public Policy, Duke University

2000 Department of Biostatistics and Bioinformatics Chair Search Committee, Duke University School of Medicine

2001-2004 Steering Committee, Center for Genome Ethics, Law and Policy, Institute for Genome Sciences and Policy, Duke University

2001-2005 Faculty Compensation Committee, Academic Council, Duke University

2002-2007 Advisory Board, Duke Clinical Research Institute, Duke University School of Medicine

2003-2005 Advisory Council, Kenan Institute for Ethics, Duke University

2003-2013 Staff and Faculty Fringe Benefits Committee, Duke University School of Medicine

2004-2010 Executive Committee, The Fuqua School of Business, Duke University

2004-2006 Director's Advisory Board, Institute for Genome Sciences and Policy, Duke University

2005 Panel Judge, Snyderman Research in Medical Education Award, Duke University School of Medicine

2005-2018 Oversight Committee. Duke/Coulter Translational Research Partnership, Duke University

2005 Working Group on the Environment and Health Sciences, Duke University

2005-2006 Global Health Institute Steering Committee, Duke University

2006-2015 Global Health Institute Executive Committee, Duke University

2005-2006 Planning Committee, 75th Anniversary of the Duke University School of Medicine

2007-2008 Duke Translational Research Institute Pilot Project Advisory Committee, Duke Translational Medicine Institute, Duke University

2009-2018 Member. Duke Comprehensive Cancer Center, Cancer Prevention, Detection and Control Program. Duke University Medical Center. Durham, N.C.

2009-2013 Executive Committee. Duke Center for Health Informatics (D-CHI). Durham, North Carolina.

2015-2018 Member. Faculty Governance Committee for the Duke Initiative for Science and Society. Durham, North Carolina.

2015-2018 Member, Executive Committee, Duke Clinical and Translational Science Award, Durham, NC.  
2017-2018 Member, Promotions and Tenure Committee, Department of Medicine, Duke University

#### MAJOR TEACHING AND CLINICAL RESPONSIBILITIES

1987-1993 "Introduction to Health Insurance Theory for Medical Students" (annual lecture), New York University School of Medicine  
1990-1992 Lectures on clinical economics and clinical decision making for medical interns, University of Pennsylvania School of Medicine  
1991-1992 Teaching Instructor, Medical Clinic, Hospital of the University of Pennsylvania  
1991-1992 Clinical Practice, Hospital of the University of Pennsylvania  
1991-1992 Supervision of MD/MBA student for independent research project  
1992 Coinstructor, "Health Economics and Clinical Decision Making" (Epidemiology 550), Master's in Clinical Epidemiology Program core course, University of Pennsylvania  
1992-1996 Instructor, "Health Services Research: Clinical Applications," Graduate Public Policy Institute, Georgetown University  
1992-1999 Teaching Attending Physician, General Internal Medicine Clinic, Georgetown University Medical Center  
1993 Guest Lecturer, Minority High School Program, New York University School of Medicine  
1997-1999 Instructor, "Economic Evaluation of Medical Care," Graduate Public Policy Institute, Georgetown University  
1999-2018 Coinstructor, "Health Economics in Clinical Research" (CRP 244), Clinical Research Training Program, Duke University School of Medicine  
1999-2012 Instructor, "Health Care Systems and Policy," The Fuqua School of Business, Duke University  
2000 Instructor, "Pharmaceutical Management and Policy," The Fuqua School of Business, Duke University  
2000-2003 Preceptor, PRIME Ambulatory Care Clinic, Durham VA Medical Center  
2000-2004 Coinstructor, "Medical Practice and Health Systems" (course for second-year medical students), Duke University School of Medicine  
2000-2018 Coinstructor, "Comprehensive Introduction to Clinical Research" (course for medical residents), Duke University School of Medicine  
2001-2003 Lecturer, "Biotech for Business," Department of Chemistry, Duke University  
2001-2012 Instructor, "Biotechnology: Management of Drug Discovery," The Fuqua School of Business, Duke University  
2005-2018 Inpatient Attending Physician, Durham VA Medical Center  
2005-2006 Instructor, Duke MBA-Weekend Executive Seminar Series, The Fuqua School of Business, Duke University  
2007- Faculty Leader, Health Policy Lecture Series, Department of Medicine, Duke University School of Medicine.  
2008-2009 Faculty Leader, Health Policy and Health Economics. Second Year Medical Student Intercession Course, Duke University School of Medicine.  
2008 Faculty Leader, Global Crisis: *Healthcare*, The New Duke Advanced Management Program (AMP), Duke Fuqua School of Business.  
2009-2016 Instructor, Federal Drug Administration (FDA) Commissioner's Fellows, "Biotechnology: Management of Drug Discovery", Silver Spring, MD.  
2010-2012 Instructor, "Clinical Informatics and Strategy," The Fuqua School of Business, Duke University  
2014- Instructor, "Clinical Informatics and Strategy," The Duke University School of Medicine, Duke University  
2014-2016 Instructor. "Global Health Care Systems." Duke University Master's in Global Health, Durham, NC  
2013-2016 Visiting Professor. "Innovating in Health Care" Harvard Business School, Harvard University. Boston, Massachusetts.  
2014 Visiting Professor. "Innovating in Biomedical Technology" Harvard Business School, Harvard University. Boston, Massachusetts.  
2014-2016 Visiting Professor. "Innovating in Healthcare Field Course" Harvard Business School, Harvard University. Boston, Massachusetts.

#### STUDY SECTIONS

1992-1993 Ad hoc National Scientific Review and Evaluation Group, National Cancer Institute  
1993 Site Visitor, Cancer Center Renewal Application, National Cancer Institute  
1993 Panel Member, Special Emphasis Panel for Demonstration and Education Research Grants, National Heart, Lung, and Blood Institute  
March 1994 Ad hoc Member, Clinical Trials Review Committee, National Heart, Lung, and Blood Institute

October 1994 Consultant, Clinical Trials Review Committee, National Heart, Lung, and Blood Institute  
1994- Ad hoc Reviewer, Agency for Healthcare Research and Quality (formerly the Agency for Health Care Policy and Research)  
1996 Special Emphasis Panel Member, "Referrals from Primary to Specialty Care," Agency for Health Care Policy and Research  
1996-1999 Ad hoc Reviewer, Clinical Trials Review Committee, National Heart, Lung, and Blood Institute  
1997-2001 Cooperative Studies Evaluation Committee, Veterans Health Administration Cooperative Studies Program  
1999, 2001 Reviewer, HCFO/Round 2 Health Tracking Proposal Review Meeting, Alpha Center and Robert Wood Johnson Foundation  
1999-2006 National Advisory Committee, Investigator Awards in Health Policy Research, Robert Wood Johnson Foundation  
2001 Review Panelist, "Studies of Adverse Effects of Marketed Drugs," Food and Drug Administration, Rockville, MD  
2002 Reviewer, Special Emphasis Panel, Loan Repayment Applications, US Department of Health and Human Services  
2002 Reviewer, Comprehensive International Program of Research on AIDS, National Institute of Allergy and Infectious Disease  
2004 Reviewer, Ethical, Legal, and Social Implications of Human Genetics, Center for Scientific Review, National Institutes of Health  
2004-2005 Reviewer, Coronary Revascularization in Diabetic Patients with Multivessel Disease Trial, National Heart, Lung and Blood Institute  
2008 Reviewer, Centre for Health Economics, Services, Policy, and Ethics in Cancer Control (HESPE), National Cancer Institute of Canada  
2009 Reviewer, NIH ELSI Centers of Excellence Review, Bethesda, Maryland  
2008- Reviewer, Susan G. Komen for the Cure/ASCO Cancer Foundation Research Initiative  
2011 Reviewer, Disparities, Cancer Risk, Prevention & Prognostic Factors SEP Review, National Cancer Institute

#### MAJOR COMMITTEES AND APPOINTMENTS

1992-1995 Steering Committee, "Ethical Considerations in the Business Aspects of Health Care," Seminar in Business Ethics, Woodstock Theological Center, Georgetown University, Washington, DC  
June 1993 Faculty Member, Canadian Collaborative Workshop on Pharmacoeconomics, Health and Welfare Canada, Ottawa, Ontario, Canada  
1994 Co-chair, National Cancer Institute Economic Conference--Integration of Economic Outcome Measures Into NCI-Sponsored Therapeutic Trials, National Cancer Institute, Bethesda, Md  
1995-2004 Member, Clinical Economic Working Group, Cancer and Leukemia Group B (CALGB), National Cancer Institute, Bethesda, MD  
1995-2003 Conference Grant Principal Investigator, Planning Committee (Chair, Abstract Review Committee, 1995; Cochair, Abstract Review Committee, 1997), National Research Service Award Trainees Research Conference, Agency for Healthcare Research and Quality and Health Resources and Services Administration  
1996-1997 Chair, National Cancer Institute-American Society of Clinical Oncology Economics Workshop, Washington, DC  
1998-1999 Total Artificial Heart Review Panel, National Heart, Lung, and Blood Institute, Bethesda, MD  
2007-2012 Member, Roundtable on Translating Genomic-Based Research for Health, Institute of Medicine of the National Academies, Board on Health Sciences Policy, Washington, DC  
2009 Member. Governor's HIT Task Force Committee. State of North Carolina, Raleigh, North Carolina.  
2010-2013 Member. Medicare Evidence Development & Coverage Advisory Committee (MEDCAC). Centers for Medicare and Medicaid Services, Department of Health and Human Services.  
2010 Provenge MEDCAC Review Committee, CMS, Baltimore, MD  
2010-2012 Physician Advisory Board, Blue Cross Blue Shield, NC.  
2010- Health Care Policy and Management Advisory Committee. China-Europe International Business School (CEBIS). Shanghai, China.  
2012-2015 Scientific Advisory Board. Nutrition Science Initiative. San Diego, CA  
2013-2017 Member, Kaiser Permanente Institute for Health Policy External Advisory Board. Oakland, CA.  
2016-2017 Member. Committee of Health Care Utilization and Adults with Disabilities. National Academy of Sciences. Washington, DC.

- 2017- Member, Leonard David Institute Executive Advisory Board. The Wharton School. The University of Pennsylvania. Philadelphia, PA.
- 2017- Member, Advisory Board. Department of Health Sector Management and Policy. School of Business Administration. The University of Miami. Coral Gables, FL.

### PANELS/SELECTED TALKS

- 1993 Panelist, Behavioral Working Group (Health Care Utilization), Women's Interagency HIV Study, National Institute of Allergy and Infectious Disease, Bethesda, Md
- 1994 Working Group Member, "Secondary Prevention Strategies of CHD: Applications of ATP II Guidelines," Division of Heart and Vascular Disease, National Heart, Lung, and Blood Institute, Bethesda, Md
- 1994 Session Chair, Annual Meeting of the Society for Medical Decision Making, Cleveland, Ohio
- 1994 Cochair, Plenary Session on Pharmacoeconomics, 34th Interscience Conference on Antimicrobial Agents and Chemotherapy, American Society for Microbiology, Orlando, Fla
- 1995 Panelist, Workshop to Build a National Strategy for Prevention, Management and Research in Chronic Obstructive Pulmonary Disease, National Heart, Lung, and Blood Institute, Bethesda, Md
- 1995 Cochair, Disease Management Short Course, Annual Meeting of the Society for Medical Decision Making, Tempe, Ariz
- 1995 Cochair, Disease Management Workshop, Drug Information Association, New Orleans, La
- 1995-1996 Working Group Member, "The Management of Patients with End-Stage Heart Failure," Northwestern University Medical School and Duke University Medical School Symposium, Orlando (1995) and Palm Beach, Fla (1996)
- 1995-1996 Planning Committee, Oncology Managed Care Program, Lombardi Comprehensive Cancer Center and Clinical Economics Research Unit, Georgetown University Medical Center, Bethesda, Md, and Arlington, Va (sponsored by Xerox Corporation)
- 1996 Participant, Mobile Breast Care Center Meeting, Department of Defense Telemedicine Test Bed, Office on Women's Health of the US Public Health Service, and National Cancer Institute, Bethesda, Md
- 1996 Session Chairperson, Pharmacoeconomics Workshop, Drug Information Association, New Orleans, La
- 1996 Panelist, "A Framework for Research and Evaluation into the Effects of Managed Care on the Pharmaceutical Marketplace," Pharmaceutical Policy Project of the Center for Health Policy Research, George Washington University, and the Office of the Assistant Secretary for Planning and Evaluation, US Department of Health and Human Services, Arlington, VA
- 1997 Education Session Chair, Outcomes Measurement, Annual Meeting of the American Society of Clinical Oncology, Denver, Colo
- 1997-1998 Panelist, "Ethical Issues in Managed Health Care Systems," Woodstock Theological Center, Georgetown University, Washington, DC
- 1997-1998 Panelist, Ad Hoc Outcomes/Cost-Effectiveness Advisory Panel, United States Pharmacopeial Convention, Inc, Rockville, Md
- 1998 Panelist, "Barriers to Conducting Outcomes Research on Medical Imaging in the Past and How the Barriers Can be Overcome" and "Utilization of Diagnostic Tests: Assessing Appropriateness," Methodological Issues in Diagnostic Clinical Trials: Health Services and Outcomes Research in Radiology, Office on Women's Health, Public Health Service, and National Cancer Institute, and ACR Commission on Research and Technology Assessment, Bethesda, Md
- 1998 Panelist, "Cost Management in Advanced Heart Failure," Advanced Heart Failure Meeting, Charleston, SC
- 1998 Panel Member, "The Economics and Financing of End-of-Life Care," Project on Death in America Meeting, Open Society Institute, Washington, DC
- October 1999 Course Coordinator, "Prospective Economic Evaluation of Clinical Trials: Methods and Analysis," Annual Meeting of the Society for Medical Decision Making, Reno, NV
- November 1999 Session Chair, "Economic Assessment in Clinical Trials: Design and Analysis" Drug Information Association, Orlando, FL
- April 2000 Participant, "Assuring Appropriate Use of Pharmaceuticals: Balancing Cost and Quality," Prescription Drug Coverage: Rising Expenditures, Appropriate Use and Program Strategies, Agency for Healthcare Research and Quality, Washington, DC
- September 2000 Coordinator, "Economic Evaluations of Multicenter, Multinational Clinical Trials," Second European Conference on the Economics of Cancer, European Organization for Research and Treatment of Cancer, Brussels, Belgium
- September 2000 Panelist, "Race, Health Care, and Ethics: Speaking Truth to Power," Congressional Black Caucus Health Braintrust, Washington, DC

October 2000 Course Coordinator, "Prospective Economic Evaluation of Clinical Trials: Methods and Analysis," Annual Meeting of the Society for Medical Decision Making, Cincinnati, Ohio

December 2000 Panelist, "The Power of Physician Payment: Designing Incentives in a New Era," Changes in Health Care Financing and Organization, The Robert Wood Johnson Foundation, Washington, DC

2000 Panelist, "Solutions for Racial and Ethnic Disparities in Health Care," Institute for Diversity in Health Management, Advancing Health in America, Washington, DC

April 2001 Program Chair, "Internet Health Information Programs: Overview and Market Opportunities," Drug Information Association and Duke Clinical Research Institute, Durham, NC

May 2001 Panelist, "Breakfast with the Experts," Sixth Annual International Meeting of the International Society for Pharmacoeconomics and Outcomes Research, Arlington, Va

May 2001 Cochair, "Patient Centered Abstracts" Program Committee, Annual Meeting of the Society of General Internal Medicine, San Diego, Calif

June 2001 Session Chair, "Genetics and the Biotechnology Revolution," Annual Meeting of the Academy for Health Services Research and Health Policy, Atlanta, Ga

2001 Panelist, "The Productivity Factor: The Most Critical Variable," International Society for Technology Assessment in Health Care, Philadelphia, Pa

2001 Specified Data Solicitation Review Panel, Changes Health Care Financing and Organization, The Robert Wood Johnson Foundation, Washington, DC

2001 Panelist, "Ethical, Legal and Societal Issues in Biotechnology: A Primer for Industry Leaders," Center for Genome Ethics, Law and Policy, Duke University, Durham, NC

April 2002 Panelist, "Racial/Ethnic Bias and Health: Scientific Evidence, Methods, and Research Implications," Office of Behavioral and Social Sciences Research, National Institutes of Health, Vienna, Va

May 2002 Issues Panel Chair, "How Does Genomics Change Portfolio Management?," Seventh Annual International Meeting of the International Society for Pharmacoeconomics and Outcomes Research, Arlington, Va

2002 Panelist, Expert Meeting on Assessing the Spillover Effects of Managed Care on Medicare Fee-for-Service Expenditures, US Department of Health and Human Services, Washington, DC

2002 Panelist, "Challenges Seniors Face in Getting the Right Drug Therapy," Idea Rich Environment Discussion, United Health Group

2002 Session Codirector, "Coverage and Reimbursement: The Relationship Between Technology Approval and Reimbursement in the US: Where Are We? Where Are We Going?" Duke Clinical Research Institute, McLean, VA.

January 2003 Moderator, "Navigating the Pharmaceutical and Biotechnology Coverage of Reimbursement Process," Health Strategies Consultancy LLC, Washington, DC

May 2003 Program and Plenary Session Chair, Eighth Annual International Meeting of the International Society for Pharmacoeconomics and Outcomes Research, Arlington, Va

October 2003 Moderator, "Leading the Revolution in Health Care," Coach K Conference on Leadership, Duke University, Durham, NC

2003-2012 Avedis Donabedian Outcomes Research Lifetime Achievement Award Committee (Chair, 2007-present), International Society for Pharmacoeconomics and Outcomes Research, Arlington, Va

May 2004 Nominations Committee, Annual Meeting of the Society for General Internal Medicine, Chicago, Ill

June 2004 Planning Committee, AcademyHealth Annual Research Meeting, San Diego, California

October 2004 Moderator, "Challenges to the Generation of Clinical Evidence in Medical Device Trials," Medicare Coverage/Master the Changing Landscape, Health Strategies Consultancy LLC, Washington, DC

November 2004 Panelist, "What The 2004 Election Means for Health Policy in 2005 and Beyond," UNC-Duke Health Policy Forum, University of North Carolina at Chapel Hill

November 2004 Panelist, "Promises and Pitfalls of Web Publishing for Health Services Research: An Expert Meeting," AcademyHealth and the Agency for Healthcare Research and Quality, Washington, DC

February 2004 Panelist, Non-ST Elevation Myocardial Infarction Session, Fourteenth Annual Cardiovascular Conference, Beaver Creek, CO

2004-2009 Program Committee, Accelerating Anticancer Agent Development and Validation Annual Workshop, Duke Comprehensive Cancer Center with National Cancer Institute, American Association for Cancer Research, American Society of Clinical Oncology, National Cancer Institute, and others, Bethesda, MD

2004-present Advisory Board Member, The Health Industry Forum, Schneider Institute for Health Policy, Brandeis University

2004-2011 Member, Data and Safety Monitoring Board, "Future Revascularization Evaluation in Patients With Diabetes Mellitus: Optimal Management of Multivessel Disease (FREEDOM)," National Heart, Lung, and Blood Institute

May 2005 Panelist, "Global Health and Reducing Disparities: The Role of the University," North Carolina Regional Meeting, Institute of Medicine of the National Academies, Duke University, Durham, NC

June 2005 Panelist, Symposium on the Integrity of Reporting of Clinical Research Studies, Association of American Medical Colleges, Washington, DC

November 2005 Panelist, “Who Pays? Who Benefits? A Discussion of Distributional Issues in American Health Care,” Duke University School of Law, Durham, NC

November 2005 Panelist, “Fee-for-Service Trends: Evidence-Based Medicine in Part B,” Second Annual National Medicare Prescription Drug Congress, Washington, DC

December 2005 Panelist, Economic Impact of Health Care Regulations Town Hall Meeting, Action to Reduce Regulatory Burden, Office of the Assistant Secretary for Planning and Evaluation, US Department of Health and Human Services, Chicago, Ill

2005 Dissertation Defense Discussant for Peter Lindgren, “Modeling the Economics of Prevention,” Institute of Environmental Medicine, Karolinska Institutet, Stockholm, Sweden

2005 Participant, “Cardiac Disease and Its Impact on Society,” *Health Affairs* Theme Issue Planning Meeting, Washington, DC

2005 Technical Advisory Panel, Vanderbilt Center for Better Health, Vanderbilt University, Nashville, Tenn

2006 Duke University Health System/City of Durham Crime Initiative Steering Committee, Duke University, Durham, NC

2006 Panelist, “Discuss How New Approaches Could Work with the Case Example (Zometa),” Understanding the Benefits and Risks of Pharmaceuticals, Forum on Drug Discovery, Development, and Transition, Institute of Medicine of the National Academies, Washington, DC

2006 Participant, “Reinventing Health Care Delivery in the 21st Century,” Council on Health Care Economics and Policy, The Robert Wood Johnson Foundation, Princeton, NJ

2006 Panelist, “The Future of Emerging Markets in Cardiovascular Biotechnology Pharma, and Medical Devices: Where is the Money Coming From and Where Is It Going?,” SIS 2006: Emerging Technologies Symposium, Science Innovation Synergy, Bellevue, Wash

2006-2007 Member, “Development of a Practice Guideline Regarding the Use and Dosing of Warfarin, Based on Testing of CYP450 2C9 and VKORC1,” American College of Medical Genetics Foundation

June 23, 2008 Session Chair and Discussant. “Doctors, Patients, and the Racial Mortality Gap: What are the Causes? “Neighborhood Differences and Health Disparities, The 2<sup>nd</sup> Biennial Conference of the American Society of Health Economists (ASHE), Durham, NC.

June 23, 2008 Session Chair. “Hospital Quality.” The 2<sup>nd</sup> Biennial Conference of the American Society of Health Economists, (ASHE), Durham, NC.

June 24, 2008 Panel Discussant. “Information and Quality when Motivation is Intrinsic: Evidence from Surgeon Report Society for Health Economics, The 2<sup>nd</sup> Biennial Conference of the American Society of Health Economists.

2009 Member, Planning Committee. “Systems Evaluation of Genome-Based Health Care”. Institute of Medicine. Washington, DC.

2009 Member, Roundtable. “Effectiveness Research Innovation Collaborative (ER-IC)”. Institute of Medicine. Washington, DC.

2009 Chair. Clinical Effectiveness Research Innovation Collaborative Committee (CER-IC), Institute of Medicine, Washington, DC.

2009-2010 Member. Commission on Accreditation of Healthcare Management Education Standards Council. MBA Task Force. Arlington, Virginia.

Nov 12, 2009 Panel Discussant, “Law School Panel on Health Care”, Duke Forum of Law and Change. Duke University Law School. Durham, NC.

Feb 22, 2010 Panel Discussant. “Impact of Healthcare Reforms on Biotech”, CED’s Biotech 2010 Conference, Raleigh, North Carolina.

April 17, 2010 Panel Discussant, “Panel discussion on “Health Care: Why it passed – or failed...again”, Duke Arts & Academics. Durham, North Carolina.

Sept 22, 2010 Panel Discussant, “Cost Savings and Consumer Preference”, 2010-11 Harkness Fellows' Orientation Seminar, Harkness Fellowship in Health Care Policy and Practice. The Commonwealth Fund. New York, New York.

Oct 12, 2011 Moderator, Panel Discussion: Providers & Payers: What are their consumer programs and their challenges? Duke University’s Third Annual Medical Innovation & Strategies Conference: Consumer Healthcare & Wireless Technologies. Durham, North Carolina.

Oct 15, 2010 Panel Member: Impact of Health Policy on Patient Care and Nursing Education Duke University. School of Nursing, Board of Advisors Meeting, Durham, NC

Oct 20, 2011 Panel member: Resolved: ACOs – Nice Idea, Won’t Work. A Symposium Debate, 2011 Connected Health Symposium Driving Quality Up and Costs Down: New Technologies for an Era of Accountability, Boston, MA

Oct 21, 2011 Panel Member: Closing Panel: A Special Symposium Discussion 2011 Connected Health Symposium Driving Quality Up and Costs Down: New Technologies for an Era of Accountability, Boston, MA



- 2011- Advisory Board Member. China-Europe International Business School (CEIBS) Centre for Health Care Policy and Management. Shanghai, China.
- Nov 7 & 8 2011 Panel Member: Envisioning a Transformed Clinical Trials Enterprise in the United States: Establishing an Agenda for 2020. "IOM Drug Forum Clinical Trials Enterprise Workshop". Washington, DC
- Dec 3- 4, 2013 Faculty Leader, "Innovation in Health Care 2013: A Management Education Agenda." Duke University Medical Center, Durham, North Carolina.
- Sept 14, 2015 Moderator: Session III, Specialty Pharmaceuticals Marketplace: Is Price Inelasticity Sustainable? 2015 Princeton Conference Report. The Council on Health Care Economics and Policy at Brandeis University. Princeton, New Jersey.  
Health Policy Expert. NEJM 360.
- Sept 29, 2017 Panelist. Unbundling and rebundling health benefits: Innovative rethinking of health care delivery and competition. American Enterprise Institute, Washington, DC.
- October 6, 2017 Moderator. Innovation Education for Life Sciences: Degree Students, Executives, and Professionals. Global Educators Network for Health Care Innovation Education (GENiE) Conference, Boston, MA.
- 2018- International Advisory Board Member. International Clinical Economic Evaluation Experts Cooperation Committee. Beijing, China.

### LECTURES BY INVITATION

- September, 1987 "Introduction to Health Insurance Theory for Medical Residents," New York University School of Medicine, New York, NY
- October 17, 1989 "Assessing Physicians' Estimates of the Probability of Coronary Artery Disease," Annual Meeting of the Society for Medical Decision Making, Minneapolis, Minn
- February, 1990 "The Cost-Effectiveness of the Pharmacologic Treatment of High Blood Cholesterol," Mid-Atlantic Regional Meeting of the Society for General Internal Medicine, Philadelphia, Penn
- May, 1990 "Cost-Effectiveness of Low-Dose Zidovudine Therapy for Asymptomatic Patients Infected with Human Immunodeficiency Virus," National Meeting of the American Federation for Clinical Research, Washington, DC
- November, 1990 "Societal Costs of Liver Transplantation: Implications for Program Management," Annual Meeting of the Society for Medical Decision Making, Boston, Mass
- April 6, 1991 "Cost-Effectiveness of Low-Dose Zidovudine Therapy for Asymptomatic Patients Infected with Human Immunodeficiency Virus," International Seminar Series: The Management of HIV Infection: Economic Aspects of HIV Management, The Wellcome Foundation, Lausanne, Switzerland
- May 9, 1991 "Cost-Effectiveness as a Tool: Application to the Therapy of Hypercholesterolemia," Endocrine Grand Rounds, Hospital of the University of Pennsylvania, Philadelphia, Pa
- July 2, 1991 "Technology Assessment: Clinical Economic Impact of HA-1A Monoclonal Antibody for Gram-Negative Sepsis," Annual Meeting of the Association for Health Services Research, San Diego, Calif
- October 9, 1991 "Evaluations of the Results of Health Economics Studies: Quality of Life, Quantification of Benefits and Quality Adjusted Life Years," Seminar on Health Economics, Presentation to the Director General of the Division of Pharmaceutical Affairs, Portuguese Health Ministry, Cascais, Portugal
- October 23, 1991 "Prospective Economic Assessment of Medical Technologies: Methodologic Issues in Medicare Funding of New Technologies," Annual Meeting of the Society for Medical Decision Making, Rochester, NY
- November 12, 1991 "Evaluation of Cancer Diagnostic Tests: Understanding the Implications of New Technologies," Office of Device Evaluation, Food and Drug Administration, Rockville, Md
- May 13, 1992 "Economic Assessment of Pharmaceuticals: Formulary Assessment," Ralph D. Arnold Pharmaceutical Services Management Course, US Department of the Army, Denver, Colo
- May 25, 1992 "Economic Evaluation of HA-1A Therapy," Annual Meeting of the Society of Critical Care Medicine, San Antonio, Tex
- June 1, 1992 "Cost-Effectiveness of Cholesterol-Lowering Drug Therapy," Annual Meeting of the American Society of Hospital Pharmacists, Washington, DC
- September 22, 1992 "Integrating Economic Evaluations Into Phase III Clinical Trials: The Multidisciplinary Team," Annual Seminar of the Project Management Institute, Pittsburgh, Pa
- September 23, 1992 "Valuing Costs and Benefits of Pharmaceuticals," Roundtable on Cost-Effectiveness and Public Policy, Institute for Public Policy Studies, Vanderbilt University, Nashville, Tenn
- October 18, 1992 "Comparing Methods to Project Cost-Effectiveness Ratios from Clinical Trials," Health Policy: Values, Outcomes and Choices, Annual Meeting of the Society for Medical Decision Making, Portland, Ore

October 19, 1992 The CDC Lookback Programs for HIV Transmission, Public Transmission: Public Safety from a Negative Epidemiologic Study

March 12, 1993 "Application of Economic Analysis to Clinical Practice: The Case of HA-1A Therapy," Second Regional Symposium of the Canadian Coordinating Office for Health Technology Assessment, Calgary, Alberta

March 23-24, 1993 "Cost-Effectiveness: Definitions and Overview of International Approach. Critique of Guidelines, Clinical Data, Surrogate Endpoints, Economic Assessment of Pharmaceuticals," Meeting of the Drug Information Association, Sydney, Australia

April 26, 1993 "Integrating Cost-Effectiveness Analysis into Pulmonary Rehabilitation Research," NIH Pulmonary Rehabilitation Workshop, National Institute of Child Health and Human Development and National Heart, Lung, and Blood Institute, Bethesda, Md

May 1, 1993 "Economic Evaluation of Clinical Trials," Annual Meeting of the Society for General Internal Medicine, Washington, DC

June 21-22, 1993 "An International Perspective on Guidelines Development: Approaches, Challenges, and Future Directions--USA," Canadian Collaborative Workshop on Pharmacoeconomics, Health and Welfare Canada, Sainte-Adele, Quebec

December 7, 1993 "Economic Evaluation of Clinical Practice," Annual Meeting of the American Academy of Dermatology, Washington, DC

April 21, 1994 "Overview of Clinical Economics--Case Discussion: Stage II and III Breast Cancer," National Cancer Institute Symposium on Integration of Economic Outcome Measures into NCI-Sponsored Therapeutic Trials, Bethesda, Md

April 27, 1994 "Development of the Interactive Computer Program in Clinical Economics," Microcomputer Users Group Workshop, Annual Meeting of the Society for General Internal Medicine, Washington, DC

May 9, 1994 "Economic Evaluation in Clinical Trials," Annual Meeting of the Society for Clinical Trials, Austin, Tex

July 19, 1994 "Development of Multi-Media Educational Material: A Case Study Workshop," Annual Meeting of the American Association of Colleges of Pharmacy, Albuquerque, NM

September 20, 1994 "Pharmacoeconomic Claims in Drug Advertising (Rx2-87)," Annual Conference and Exhibition of the Regulatory Affairs Professionals Society, Washington, DC

October 1, 1994 "Essentials of Economic Evaluation," Economic Working Group, Cochran Colloquium, Ontario

October 7, 1994 "Overview of Pharmacoeconomics," 34th Interscience Conference on Antimicrobial Agents and Chemotherapy, American Society for Microbiology, Orlando, Fla

November 1, 1994 "New Uses of Multimedia in Computer-Assisted Learning," Association of American Medical Colleges, Boston, Mass

November 2, 1994 "The Role of Economic Evaluation in the Assessment of Therapeutic Efficacy for New Compounds," Food and Drug Administration Staff College, Bethesda, Md

November 10, 1994 "Using Economic Analysis to Determine Endpoints for Clinical Trials," Drug Information Association Conference on Cost-Effectiveness Analysis-Measures and Methods in Clinical Trials, Orlando, Fla

March 14, 1995 "Analysis of Pharmacoeconomic Data," Drug Information Association Biostatistics Conference, Hilton Head, SC

April 3, 1995 "Designing Trials for Economic Evaluations," International Symposium on Issues of Standardization in Economic Evaluations of Pharmaceuticals, Center for Pharmaceutical Outcomes Research, Chapel Hill, NC

May 5, 1995 "Economic Assessment of Cancer Therapies," Annual Meeting of the Cancer and Leukemia Group B, Providence, RI

June 6, 1995 "A Health Services Approach to the Evaluation of Innovative Pharmaceuticals and Biotechnology Products," Annual Meeting of the Association for Health Services Research and the Foundation for Health Services Research, Chicago, Ill

June 29, 1995 "Prospective Economic Evaluation of Clinical Therapies," Grand Rounds, Roswell Park Cancer Center, Buffalo, NY

July 31, 1995 "Approaches for Technology Assessment in Telemedicine in the Department of Defense," Session Provocateur, Chestertown Roundtable, Symposium of the Department of Defense Telemedicine Testbed Program, Chestertown, Md

September 22, 1995 "Pharmacoeconomics and New Drug Evaluation," Annual Meeting of the American College of Clinical Pharmacology, Rockville, Md

October 10, 1995 "Designing Trials for Economic Evaluations," Grand Rounds, Fairfax Hospital, Fairfax, Va

October 14, 1995 "Introduction to Disease Management," Disease Management Short Course, Annual Meeting of the Society for Medical Decision Making, Tempe, Ariz

November 6-7 1995 “What Are the Issues and Problems in Defining Quality Oncology Care?,” Session Moderator, Oncology Managed Care Program, Xerox Corporation and the Lombardi Comprehensive Cancer Center and the Clinical Economics Research Unit, Georgetown University Medical Center, Bethesda, Md

November 10, 1995 “Designing Trials for Economic Evaluations,” Methodologies in Healthcare Outcomes in Gastroenterology: A Workshop Symposium, University of Illinois at Chicago Medical Center and the Gastroenterology Research Group, Chicago, Ill

December 1-2, 1995 “Methodological and Statistical Issues of Quality of Life and Economic Evaluation in Cancer Clinical Trials,” Session Chairperson, EORTC Symposium, Brussels, Belgium

December 5, 1995 “The Rationale for Disease Management,” Drug Information Association Disease Management Workshop, New Orleans, La

February 27, 1996 “Clinical Economics,” Grand Rounds, Howard University Hospital, Washington, DC

March 21, 1996 “Disease Management: Dissecting the Gatekeeper Model,” Agency for Health Care Policy and Research, Rockville, Md

April 19, 1996 “Reforming the Food and Drug Administration: The Pharmaceutical Approval Process,” American Enterprise Institute for Public Policy Research, Washington, DC

May 7, 1996 “HMOs’ Purchase of Tertiary Care Services in Three Markets,” Oncology Managed Care Program, Xerox Corporation with the Lombardi Comprehensive Cancer Center and the Clinical Economics Research Unit, Georgetown University Medical Center, Arlington, Va

July 31, 1996 “Cost-Effectiveness Issues in Screening Programs,” Mobile Breast Care Center Meeting, Department of Defense Telemedicine Testbed, Office on Women’s Health, Public Health Service and the National Cancer Institute, Bethesda, Md

August 24, 1996 “Designing Trials for Economic Evaluations,” Methodologies in Outcomes Research for Gastroenterologists Workshop, University of Illinois at Chicago Medical Center and the Gastroenterology Research Group, Seattle, Wash

September 6, 1996 “Study of Bone Diseases: Economic Evaluation,” Third International Bone Disease Symposium of the International Federation of Societies on Skeletal Diseases, in conjunction with the International Society for Clinical Densitometry, Chantilly, Va

October 24, 1996 “PBM Roundtable,” Center for the Study of Drug Development, Tufts University, Boston, Mass

November 1, 1996 “Economic Evaluation of Cancer Therapies,” Grand Rounds, Memorial Sloan Kettering Cancer Center, New York, NY

November 14-15, 1996 “Design of Clinical Trials for Economic Evaluation” and “The Results of the FIRST Study Economic Evaluation,” Drug Information Association Workshop, New Orleans, La

November 20, 1996 “Policy Issues in Pharmaceutical Cost-Effectiveness Research,” Discussant, American Enterprise Institute for Public Policy Research, Washington, DC

March 9, 1997 “Marketing of Generic Drugs,” Annual Meeting of the Generic Pharmaceutical Industry Association, Miami, Fla

April 17-19, 1997 “ACE Inhibitors for CHF: Comparative Economic Data,” Economics and Cost Effectiveness in Evaluating the Value of Cardiovascular Therapies, Duke Clinical Research Institute, St. Petersburg, Fla

May 18-19, 1997 “Outcomes Measurement” Education Session Chair, and “Health Services Research” Discussant, Annual Meeting of the American Society of Clinical Oncology, Denver, Colo

May 26, 1997 “Data Collection in Prospective Economic Studies,” Annual Meeting of the International Society of Technology Assessment in Health Care, Barcelona, Spain

July 23, 1997 “Clinical Economics and Reimbursement for New Technologies,” Ministry of Health and Welfare, Tokyo, Japan

July 23, 1997 “Economic Evaluation in Clinical Trials,” Keio University, Tokyo, Japan

September 19, 1997 “Designing Trials for Economic Evaluation,” Speaker and Session Chair, Methodologies in Healthcare Outcomes in Gastroenterology, Philadelphia, Pa

September 30, 1997 “The Relationship Between CD4 Count, Viral Burden, and Quality of Life Over Time in HIV-1 Infected Patients,” 37th Interscience Conference on Antimicrobial Agents and Chemotherapy, Toronto, Ontario

November 6, 1997 “Introduction to Economic Assessment in Clinical Trials,” Drug Information Association Workshop, Hilton Head, SC

February 3, 1998 “Comparative Research on Cost Effectiveness of Alternative Disease Treatments,” New York Pharma Forum, Inc, New York, NY

July 2, 1998 Speaker, “The Effect of Pharmaceutical Benefits Managers: Is it Being Evaluated?,” Pharmaceutical Issues Seminar, Consumer Federation of America. Washington, DC

September 24, 1998 "Bayesian Analysis in Laypersons' Terms," Session Chair, Health Economics and Outcomes Research: Making Statistics and Analysis More Relevant to Decision Makers, Medtap International and the Agency for Health Care Policy and Research, Chantilly, Va

October 3, 1998 "What Outcomes Research Tells Us About Cost-Effectively Managing Cardiovascular Risk," Heart to Heart Symposium, United HealthCare, Orlando, Fla

October 25, 1998 "Prospective Economic Evaluation of Clinical Trials: Methods and Analysis," Course Coordinator, Annual Meeting of the Society for Medical Decision Making, Boston, Mass

October 26, 1998 "The Effect of Race and Gender on Referral for Cardiac Catheterization," Annual Meeting of the Society for Medical Decision Making, Boston, Mass

October 29, 1998 "The True Costs of Pharmaceutical Therapy: Adverse Drug Reactions and Their Effect on the Health Care System," Quality of Care, Meeting on the Needs of Diverse Populations. 13th Annual Symposium of the Center for Clinical Quality Evaluation, Arlington, Va

November 10, 1998 "Economic Evaluation of Clinical Trials: Talking Past Customers," Economic Assessment in Clinical Trials: Design and Analysis, Drug Information Association Workshop, New Orleans, La

December 9, 1998 "The Effect of Race and Gender on Physician Recommendation for Cardiac Catheterization," Grand Rounds, Mayo Clinic, Rochester, Minn

March 9, 1999 "Effect of Race and Gender on Physician Recommendation for Cardiac Catheterization," Annual Scientific Session of the American College of Cardiology, New Orleans, La

May 7, 1999 "Moral Hazard Revisited: Is Health Insurance an Appropriate Financing Mechanism for Pharmaceutical Products?," Keynote Speaker, Fifth Wintergreen Conference of the University of Maryland and the Center on Drugs and Public Policy, Wintergreen, Va

May 14, 1999 "Academic-PRO Collaborations," DC Campaign for Medicare Excellence, Washington, DC

May 19, 1998 "Race and Gender Disparities in Health Care," Special Guest, Congressional Black Caucus, Washington, DC

May 20, 1998 "The Effect of Race and Gender on Physician Recommendation for Cardiac Catheterization," Office of Civil Rights Managers Conference, Office of Civil Rights, US Department of Health and Human Services, Washington, DC

June 10, 1999 "Race and Gender Bias in Clinical Decision Making," Women's Health Seminar Series, Department of Health and Human Services, Washington, DC

October 14, 1999 "Race as a Factor in Medical Decision-Making," Race, Ethnicity, and Medical Care: Improving Access in a Diverse Society, The Henry J. Kaiser Family Foundation, and Washington, DC

October 22, 1999 "Moral Hazard Revisited: Is Health Insurance an Appropriate Financing Mechanism for Pharmaceutical Products?" Program on Health Outcomes Seminar Series, University of North Carolina at Chapel Hill

November 8, 1999 "Race as a Factor in Physician Decision-Making," Eliminating Racial and Ethnic Disparities: Identifying Challenges and Building Partnerships, Mount Sinai School of Medicine and the Greater New York City Hospital Association, New York, NY

November 15, 1999 "Introduction to Economic Assessment in Clinical Trails: Design and Analysis," Drug Information Association, Orlando, Fla

April 3-4, 2000 "Internet Health Information Programs: Overview and Market Opportunities," Program Chairperson, Drug Information Association, Durham, NC

June 18, 2000 "The New Millennium: "The Impact of Genetics on the Structure of the Health Sector," The Charlene Worcester Memorial Lecture, Baptist Health System, Birmingham, Ala

March 29, 2000 "Maximizing the Value of Phase III Clinical Trials": Balancing the interest of the public in evidenced based medicine with access to new therapies and the need for return on investment by industry, Reducing Costs of Phase III Clinical Trials, Duke Clinical Research Institute, Vienna, Va

December 1, 2001 "Eliminating Racial Disparities in Health Care", Racial Disparities in Health Care Outcomes: Sources, Science, and Solutions, Student National Medical Association Regional Conference. Duke University Medical Center, Durham, NC

June 11, 2001 "Genomics and the Biotechnology Revolution" 2001 Annual Meeting of the Academy for Health Services Research and Health Policy, Atlanta, Ga

July 20, 2001 "Race, Sex, and Clinical Decision Making," Seminar Series on Methods in Health Disparities Research, Health Services Research, University of North Carolina at Chapel Hill

January 22, 2002 "Eliminating Racial Disparities in Health Care," Martin Luther King, Jr, Day Celebration, Duke University Medical Center, Durham, NC

January 24, 2002 "The Future of the Health Care System," Triangle Healthcare Executive Forum, Durham, NC

September 24, 2002 "The Implications of Genomics for the Practice of Medicine," Baptist Montclair Annual Medical Staff Meeting, Birmingham, Ala

November 1, 2002 "Results of the *NEJM* Survey," Conflict of Interest Roundtable Meeting, Duke Clinical Research Institute, Tysons Corner, Va

July 17, 2002 "Interpreting Racial Disparities in Access to Health Care," Ethics, Humanism and Health Care Policy Seminar of the Minority Medical Education Program. Duke University, Durham, NC

February 28, 2003 "Eliminating Racial Disparities in Health Care," Minority Health Conference, University of North Carolina at Chapel Hill

May 5, 2003 "Reaction to Bhattachayra's Work an Preserving Incentives to Innovate;" Integrity & Accountability in Clinical Research , 2nd Annual Clinical Research Conference, National Patient Safety Foundation, Queenstown, Md

October 25, 2003 "Implications of Health Disparities", NC Health and Wellness Trust Fund Commission, Greensboro, NC

November 1, 2003 "Eliminating Racial Disparities in Health Care," Mending the Health Care Divide: Eliminating Disparities in Access for Minority and Low Income Communities, University of North Carolina School of Law, Chapel Hill, NC

November 6, 2003 "Access to and Availability of Health Care Systems", 2003 Faith Conference, North Carolina Public Health, Greensboro, NC

November 12, 2003 "Barriers to Healthcare in Durham County," Durham Health Summit 2003, Durham, NC

March 20, 2004 "Louis Diamond Lecture: Integrating Business Principles into Nephrology Practice," Renal Physicians 2004 Annual Meeting, Washington, DC

November 11, 2004 "Economics of Oncology Drug Development," Breast Spore Workshop, Duke Comprehensive Cancer Center, Chapel Hill, NC

November 13, 2004 "A National Look at Quality of Health Care," Advancing Care & Practice: A Performance Challenge, 2004 Emerging Issues Forum, North Carolina Medical Society, Pinehurst, NC

February 16, 2005 "Issues of Health Policy and Their Impact on Acute MI Care," The Fourteenth Annual Cardiovascular Conference, William Beaumont Hospital. Beaver Creek, Colo

February 24, 2005 "The Impact of Being Uninsured on Status," Meeting of the Task Force on Covering the Uninsured, North Carolina Institute of Medicine, Cary, NC

April 25, 2005 "Economics in Decision-Making in Healthcare: Making the Case for Patient-Centric Health Records and Information," 2005 Almaden Institute, Transforming Healthcare with Information, IBM Almaden Research Center, San Jose, Calif

May 16, 2005 "Can Society Afford State-of-the-Art Cancer Treatment?" ASCO Plenary Session, 2005 Annual Meeting, Orlando, Fla

September 20, 2005 "The Economics of ICDs," 9th Annual Scientific Meeting, Heart Failure Society of America, Boca Raton, Fla

October 17, 2005 "Opportunities for Collaboration With Other Duke Schools and Institutes," Strategic Planning Meeting, Cancer Prevention, Detection, and Control Program, Duke Comprehensive Cancer Center, Duke University Medical Center, Durham, NC

October 27, 2005 "Disparities as Marker of System Performance," 75th Anniversary Celebration Medical Alumni Weekend, Duke University School of Medicine, Durham, NC

November 1, 2005 "Consumer-Driven Health Care," Triad Association of Health Underwriters, Greensboro, NC

May 17, 2006 "Economics of Drug Development," Accelerating Anticancer Agent Development and Validation Workshop, Duke Comprehensive Cancer Center, Bethesda, Md

June 2, 2006 "Health Economics 101: Does Cancer Treatment Cost Too Much?," The Cost of Cancer Care in the 21st Century: Challenges and Solutions, 2006 Annual Meeting of the American Society for Clinical Oncology, Atlanta, Ga

July 19, 2006 "Pharmacogenomics and Cardiovascular Business Strategy," SIS 2006: Emerging Technologies Symposium, Science Innovation Synergy, Bellevue, Wash

November 29, 2006 "Post Marketing Drug Surveillance," NEI/FDA Ophthalmic Clinical Trial Design and Endpoints Meeting, Washington, DC

December 7, 2006 "Incentives for Innovation: Cancer Therapies in a Personalized Medicine Paradigm," Developing a Health Services Research Agenda on Emerging Cellular, Molecular, and Genomic Technologies in Cancer Care, National Cancer Institute, Bethesda, Md

December 4, 2006 "Creating the Climate for Personalized Medicine," The Genetic Age: The Era of personalized Medicine, Northwestern University, Chicago, Ill

June 5, 2007 "Benefit in Oncology: What Are the Criteria?" Translating Research into Practice, 2007 Annual Meeting of the American Society for Clinical Oncology, Chicago, Ill

September 25, 2007 "Quality from an Organizational Perspective," Duke Clinical Research Institute, Research Conference, Duke University Medical Center, Durham, North Carolina

October 3, 2007 "Accelerating Adoption of Personal Health Records." University of North Carolina, School of Public Health, Chapel Hill, North Carolina

October 5, 2007 "Collaborations Among Academia, Pharma, Biotech, and Government," National Cancer Policy Forum Workshop on Improving the Quality of Cancer Clinical Trials, Institute of Medicine of the National Academies, Washington, DC

October 8, 2007 "Health Care Costs and Projections," Health Policy Lecture Series, Department of Medicine, Duke University Medical Center, Durham, North Carolina

December 4, 2007 "Innovation: Understanding Types of Innovation and Implications for Policy," Roundtable on Translating Genomic-Based Research, Health Board on Health Sciences Policy, Washington, DC

March 19, 2008 "The Costs of Cancer Care," Hematology/Oncology Grand Rounds, Duke University Medical Center, Durham, North Carolina

May 5, 2008 "Health Care Disparities," Health Policy Lecture Series, Department of Medicine, Duke University Medical Center, Durham, North Carolina

June 5, 2008 "Quality and Strategy," Duke Educational Workshop, 2008 Thomson 100 Top Hospitals Summit, Colorado Springs, Colorado.

November 17, 2008 "Drug Safety", Cardiology Grand Rounds, Department of Medicine, Duke University Medical Center, Durham, North Carolina.

March 12, 2009 "The Macroeconomics of Health Care in the US", Radiology Grand Rounds, Department of Medicine, Duke University Medical Center, Durham, North Carolina.

April 14, 2009 "Dollars and Sense: Factors Pushing Clinical Research Out of the US," American Federation for Medical Research, The Current Crisis in Clinical Research Conference. Washington, DC.

April 23, 2009 "Challenges in Achieving a ROI in Health IT Based on the Health IT Provisions of the American Recovery and Reinvestment Act of 2009", Keynote Speaker, Delivering on the Value Proposition for Connectivity and Health, The Fuqua School of Business, Duke University, Durham, North Carolina.

May 26, 2009 "Health Reform in the US; Implications for Hospitals and Organizational Design", Graduate School of Management, St. Petersburg, Russia.

June 20, 2009 "Creating Value in the Healthcare System", Keynote Speaker. The 5<sup>th</sup> Annual China Health Care Forum 2009, Value Creation in Health Care. China Europe International Business School, Pudong, Shanghai.

June 23, 2009 "Clinical Construction of Pharmacoeconomics, Effectiveness, and Outcome Evidence", 45<sup>th</sup> Drug Information Association Meeting, San Diego, California.

September 14, 2009 "Is Healthcare Recession Proof." Federation of India Chambers of Commerce and Industry (FICCI), Delhi, India

October 8, 2009 "Health Care, Health Insurance, and the Future of the Health System", Humanities in Medicine Lecture Series. Duke University Medical Center. Durham, North Carolina

November 7, 2009 "Organization Innovation: The Future Shape of Academic Medicine", Society of Clinical Surgery Meeting, Durham, North Carolina.

November 17, 2009 "Organizational Innovation in Healthcare: Lessons from Emerging Markets", Harvard School of Business. Boston, Massachusetts.

December 1, 2009 "Health Care Economics & Health Care Disparities", Health Policy Lecture Series, Duke University Medical Center. Durham, North Carolina.

June 4, 2010 "The Economics of it All, What Do We Need to Know?" Pharmacogenetics and Hepatitis: C: Unraveling new Pieces of the Puzzle. Beth Israel Deaconess Medical Center and Duke Clinical Research Institute. McLean, Virginia.

June 23, 2010 "Economics of Oncology Drug Development", 2010 Accelerating Anticancer Agent Workshop. Sponsored by FDA, the Duke Comprehensive Cancer Center, the NCI, AACR and ASCO. Bethesda, Maryland.

August 24, 2010 "Rethinking the Boundaries. Health Reform in the United States: Implications for Hospitals and Organizational Design". West China Hospital, Sichuan University, Chendu, China.

October 20, 2010 "Healthcare Reform: The Impact on Healthcare in the USA." Duke Club of Wilmington, Wilmington, NC.

October 22, 2010 "Healthcare Reform: Statement of the problem and implications for innovation." Keynote Address. Leading in Turbulent Times: Evolving Relationships in the New Health Care Arena. Feagin Health Policy Leadership Weekend. Duke University. Durham, NC

October 28, 2010 "Collaboration of key stakeholders to provide complementary and integrated interventions including data collection and feedback: leveraging health IT transformation" Medication Adherence: What do we need to get people to take their medicines? Duke Clinical Research Institute, Tyson's Corner, VA.

Nov 4 & 5, 2010 Yale University School of Medicine Visiting Professor. Yale University, New Haven, CT

June 12, 2011 "Technology and the Impact on Health Care Delivery", Emerging Market, Emerging Innovation, CEIBS 7<sup>th</sup> Annual China Health Care Forum 2011, China Europe International Business School, Shanghai, China

Nov 9, 2011 Moderator, Panel Discussion. “Nursing Home & Assisted Living” Duke MBA Health Care Conference, Fuqua School of Business, Durham, North Carolina.

Nov 10, 2011 Panel Member: Obesity -Cardiac Disease –Diabetes, Business Solutions for a Global Epidemic, Fuqua School of Business, Durham, NC

Nov 16, 2011 Panel Member: Transformative Change in the Delivery System, Clinician Leadership for Health Care Reform: Reforming Policies and Reforming Care. Engelberg Center for Health Care Reform at Brookings, Brookings Institution, Washington, DC.

December 13, 2011 “Changing Paradigm of Healthcare Industry – The Need for Transformation”, Health System Integration Council Meeting, VHA Southeast, Inc., Tampa, Florida

February 7, 2012 “Healthcare Delivery: The Role of IT Modernization” Challenges To Improving Healthcare Delivery: The Role of IT Modernization, Verizon Regional Kick Off, Verizon Connected Healthcare Solutions, Reston, Virginia

February 21, 2012 “Engaging Employees in Wellness Using Wireless Technology”, HIMSS12 Conference, Las Vegas, Nevada

March 9, 2012 “Rethinking Boundaries”, Board of Trustees Meeting, VHA Southeast Inc. Tampa, Florida

October 5, 2012 Discussant. 21st Century Health Care Management Education: Confronting Challenges for Innovation with a Modern Curriculum, Harvard Business School, Boston, Massachusetts

Oct 17, 2012 Moderator, Health Care Reform Panel. NC BIO Annual Meeting, North Carolina Biotechnology Research Center, Triangle Park, NC

October 23, 2012 “How Innovation is Driving Changes in Patient Behavior”, 2012 Verizon Healthcare Customer Advisory Board, Verizon Enterprise Solutions, Boston, Massachusetts

Nov 13, 2012 CHANGE OF PLANS: The State of Healthcare & The Election, Duke University

December 4, 2012 “Recommendations for Implementation: Coverage”, Atrial Fibrillation Think Tank, Duke University Medical Center, Tysons Corner, Virginia

March 4, 2015 “The Cost of Healthcare”, Leadership North Carolina, Class XXII, Health and Human Services Session. Greenville, NC

March 18, 2015 “Specialty Pharmaceuticals and Personalized Medicine: An Economic Perspective”, Cone Health, Greensboro, NC.

May 14, 2015 “The Cost of Cancer Care”, US Oncology Network Spring 2015 Annual Conference. Coronado, CA.

Sept 18, 2015 “Healthcare Innovation”. CERC National Guest Scholar. Center for Advanced Study in the Behavioral Sciences. Sanford University. Palo Alto, California.

January 15, 2016 Keynote Speaker: “The Pivot: From Fee for Service to Population Health”. Medical Staff Annual Retreat. University of Arizona. Tucson, Arizona.

Mar 16, 2016 Speaker. Navigating The Transition to Value – “The Pivot from FFS to Population-Based Health.” Research Triangle Foundation. Raleigh, NC.

June 23-26, 2016 Invited Participant. Aspens Ideas Festival Spotlight Health. Aspen, Colorado.

July 6, 2016 Panelist. Commonwealth Fund Initiative on Digital Health. New York, NY.

July 19, 2016 Faculty Leader. “Balanced Scorecard.” Healthcare Leadership Academy. Abuja, Nigeria.

August 16, 2016 “Healthcare Innovation”. CERC National Guest Scholar. Palo Alto, California (webinar)

September 14-15, 2016 Invited Participant. Alexandria Summit-Healthcare Economics. New York, NY.

September 17, 2016 Plenary Speaker: “The Economics of Precision Medicine.” American Association of Neuromuscular and Electrodiagnostic Medicine (AANEM) Annual Meeting. New Orleans, LA.

October 26, 2016 Session Chair. Innovation Management and Entrepreneurship in Life Science Degree Programs. GENIE 1<sup>st</sup> European Edition with EIT Health and IESE Business School. Barcelona, Spain.

Nov 17, 2016 Visiting Professor. “Specialty Pharmaceuticals.” The Wharton School, The University of Pennsylvania. Philadelphia, PA.

Nov 18, 2016 Speaker. “The Pivot.” American Society of Echocardiography. ASE Board of Directors Meeting. Raleigh, NC

Nov. 25, 2016 Faculty. “Balanced Scorecard.” Healthcare Leadership Academy. Abuja, Nigeria (webinar)

Dec. 13, 2016 Speaker. “Specialty Pharmaceuticals.” Committee on Access to Affordable Drug Therapies. National Academies of Science. Washington, DC.

April 5, 2017 Keynote Speaker. “The Pivot.” NCAHQ Annual Education Conference, Durham, NC.

May 3, 2017 Faculty Seminar. “The Pivot.” UT Southwestern School of Medicine, Dallas, Tx.

July 26, 2017 Grand Rounds. “The Pivot.” Stanford University School of Medicine. Palo Alto, CA.

September 29, 2017 Unbundling And Rebundling Health Benefits: Innovative Rethinking Of Health Care Delivery And Competition. AEI. Washington, DC.

February 9, 2018 Intersocietal Accreditation Commission (IAC) Board of Directors annual meeting, “Transition From Fee-for-Service to Value: The Impact on Health Care Delivery Systems and Quality Measurement. Fort Lauderdale, Fl.

## EDITORIAL POSITIONS

1993-2003	International Editorial Board, <i>PharmacoEconomics</i>
1994-1996	Working Party Member, "Methodological Guidelines for Economic Evaluations," <i>British Medical Journal</i>
1995	Scientific Editor, "National Cancer Institute Conference: The Integration of Economic Outcome Measures Into NCI-Sponsored Therapeutic Trials," <i>Journal of the National Cancer Institute Monographs 19</i>
1997-present	Editorial Board, <i>American Heart Journal</i>
1997-2011	Scientific Advisory Board, <i>Value in Health</i>
1997-2006	Editorial Board, <i>Disease Management</i>
1998	Scientific Editor, <i>Journal of the National Cancer Institute Monographs 24</i>
2000-2008	Editorial Board, <i>Evidence-Based Gastroenterology</i>
2001-2010	Editorial Board, <i>American Journal of Medicine</i>
2003-2016	Editorial Board, <i>Cost Effectiveness and Resource Allocation</i>
2006-2007	Guest Editor (with Neal J. Meropol), JCO Reviews Series, "Perspectives on the Cost of Cancer Care," <i>Journal of Clinical Oncology</i>
1996-2013	Editorial Board, <i>Health Services Research</i>
2013-	Senior Associate Editor, <i>Health Services Research</i>
2017-	Senior Associate Editor, <i>Health Management, Policy and Innovation</i>

## BIBLIOGRAPHY

### ORIGINAL RESEARCH ARTICLES:

1. Green J, Singer M, Wintfeld N, Schulman K, Passman L. Projecting the impact of AIDS on hospitals. *Health Aff (Millwood)*. 1987;6:19-31.
2. Green J, Singer M, Wintfeld N, Schulman K. AIDS in New England hospitals. *N Engl J Public Policy*. 1987;4(special issue):273-283.
3. Schulman KA, Kinosian B, Jacobson TA, et al. Reducing high blood cholesterol level with drugs: cost-effectiveness of pharmacologic management. *JAMA*. 1990;264:3025-3033.
4. Schulman KA, Glick HA, Rubin H, Eisenberg JM. Cost-effectiveness of HA-1A monoclonal antibody for gram-negative sepsis: economic assessment of a new therapeutic agent. *JAMA*. 1991;266:3466-3471.
5. Greco PJ, Schulman KA, Lavizzo-Mourey R, Hansen-Flaschen J. The Patient Self-Determination Act and the future of advance directives. *Ann Intern Med*. 1991;115:639-643.
6. Schulman KA, Lynn LA, Glick HA, Eisenberg JM. Cost effectiveness of low-dose zidovudine therapy for asymptomatic patients with human immunodeficiency virus (HIV) infection. *Ann Intern Med*. 1991;114:798-802.
7. Lynn LA, Schulman KA, Eisenberg JM. The pharmacoeconomics of HIV disease. *Pharmacoeconomics*. 1992;1:161-174.
8. Schulman KA, Escarce JJ, Eisenberg JM, et al. Assessing physicians' estimates of the probability of coronary artery disease: the influence of patient characteristics. *Med Decis Making*. 1992;12:109-114.
9. Seltzer E, Schulman KA, Brennan PJ, Lynn LA. Patient attitudes toward rooming with persons with HIV infection. *J Fam Pract*. 1993;37:564-568.
10. Schulman KA, McDonald RC, Lynn LA, Frank I, Christakis NA, Schwartz JS. Screening surgeons for HIV infection: assessment of a potential public health program. *Infect Control Hosp Epidemiol*. 1994;15:147-155.
11. Schulman K, Sulmasy DP, Roney D. Ethics, economics, and the publication policies of major medical journals. *JAMA*. 1994;272:154-156.
12. Solomon NA, Glick HA, Russo CJ, Lee J, Schulman KA. Patient preferences for stroke outcomes. *Stroke*. 1994;25:1721-1725.
13. Roulidis ZC, Schulman KA. Physician communication in managed care organizations: opinions of primary care physicians. *J Fam Pract*. 1994;39:446-451.



14. Schulman KA, Glick HA. Economic evaluation of high-dose chemotherapy and bone marrow transplantation for patients with breast cancer of stage II or IIIA with more than 10 positive lymph nodes at surgical excision. *J Natl Cancer Inst Monogr.* 1995;(19):45-50.
15. Lee JH, Glick HA, Kinoshian B, Schulman KA. An interactive computer system for formulary management using cost-effectiveness analysis. *MD Comput.* 1995;12:59-65.
16. Morris CB, Schulman KA. The emerging role of the Food and Drug Administration in pharmacoeconomic evaluation during the drug development process. *Drug Inf J.* 1995;29:1105-1111.
17. Schulman KA, Yabroff KR, Glick H. A health services approach for the evaluation of innovative pharmaceutical and biotechnology products. *Drug Inf J.* 1995;29:1405-1414.
18. Lerman C, Narod S, Schulman K, et al. BRCA1 testing in families with hereditary breast-ovarian cancer: a prospective study of patient decision making and outcomes. *JAMA.* 1996;275:1885-1892.
19. Hirsh JA, Langlotz CP, Lee J, Tanio CP, Grossman RI, Schulman KA. Clinical assessment of MR of the brain in nonsurgical patients. *Am J Neuroradiol.* 1996;17:1245-1253.
20. Schulman KA, Glick H, Buxton M, et al. The economic evaluation of the FIRST study: design of a prospective analysis alongside a multinational phase III clinical trial. Flolan International Randomized Survival Trial. *Control Clin Trials.* 1996;17:304-315.
21. Knollmann BC, Corson AP, Twigg HL, Schulman KA. Assessment of joint review of radiologic studies by a primary care physician and a radiologist. *J Gen Intern Med.* 1996;11:608-612.
22. Schulman KA, Buxton M, Glick H, et al. Results of the economic evaluation of the FIRST study: a multinational prospective economic evaluation. Flolan International Randomized Survival Trial. *Int J Technol Assess Health Care.* 1996;12:698-713.
23. DeChant HK, Tohme WG, Mun SK, Hayes WS, Schulman KA. Health systems evaluation of telemedicine: a staged approach. *Telemed J.* 1996;2:303-312.
24. Mauskopf J, Schulman K, Bell L, Glick H. A strategy for collecting pharmacoeconomic data during phase II/III clinical trials. *Pharmacoeconomics.* 1996;9:264-277.
25. Drummond MF, Jefferson TO. Guidelines for authors and peer reviewers of economic submissions to the BMJ. The BMJ Economic Evaluation Working Party. *BMJ.* 1996;313:275-283.
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#### REVIEW ARTICLES AND COMMENTARIES:

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