

Committee on Energy and Commerce
U.S. House of Representatives
Witness Disclosure Requirement - "Truth in Testimony"
Required by House Rule XI, Clause 2(g)(5)

1. Your Name: Marilyn Moon		
2. Your Title: Institute Fellow and Director, Center on Aging		
3. The Entity(ies) You are Representing: I am not representing any entity. The American Institutes for Research does not take official positions; the testimony I am presenting represents only my own views based on years of research.		
4. Are you testifying on behalf of the Federal, or a State or local government entity?	Yes	No X
5. Please list any Federal grants or contracts, or contracts or payments originating with a foreign government, that you or the entity(ies) you represent have received on or after January 1, 2013. Only grants, contracts, or payments related to the subject matter of the hearing must be listed. No related grants or contracts.		
6. Please attach your curriculum vitae to your completed disclosure form.		

Signature: 

Date: 1/19/2015

INSTRUCTIONS FOR COMPLETING THE TRUTH-IN-TESTIMONY DISCLOSURE FORM

In General. The attached form is intended to assist witnesses appearing before the Committee on Energy and Commerce in complying with Rule XI, clause 2(g)(5) of the Rules of the House of Representatives, which provides:

(B) In the case of a witness appearing in a nongovernmental capacity, a written statement of proposed testimony shall include a curriculum vitae and a disclosure of any Federal grants or contracts, or contracts or payments originating with a foreign government, received during the current calendar year or either of the two previous calendar years by the witness or by an entity represented by the witness and related to the subject matter of the hearing. (C) The disclosure referred to in subdivision (B) shall include (i) the amount and source of each Federal grant (or subgrant thereof) or contract (or subcontract thereof) related to the subject matter of the hearing; and (ii) the amount and country of origin of any payment or contract related to the subject matter of the hearing originating with a foreign government. (D) Such statements, with appropriate redactions to protect the privacy or security of the witness, shall be made publicly available in electronic form not later than one day after the witness appears.

Please complete the form in accordance with these directions.

1. ***Name, Title, Entity(ies) (Items 1-3 on the form).*** Please provide the name and title of the witness and the entity(ies) on whose behalf the witness is testifying.
2. ***Governmental Entity (Item 4).*** Please check the box indicating whether or not the witness is testifying on behalf of a government entity, such as a Federal department or agency, or a State or local department, agency, or jurisdiction. Trade or professional associations of public officials are not considered to be governmental organizations.

Grants and Contracts (Item 5). Please list any Federal grants or contracts, or contracts or payments originating with a foreign government, that you or the entity(ies) you represent have received on or after January 1, 2013. For each Federal grant (or subgrant thereof) or contract (or subcontract thereof) related to the subject matter of the hearing, please include the amount and source of each. For each payment or contract originating with a foreign government related to the subject matter of the hearing, please include the amount and country of origin of each. Only grants, contracts, or payments related to the subject matter of the hearing must be listed.

3. ***Curriculum Vitae (Item 6).*** Please attach your CV to your completed disclosure form.

4. ***Submission.*** Please sign and date the form in the appropriate place. Please submit this form with your written testimony. Please note that under the Committee's rules, copies of a written statement of your proposed testimony must be submitted before the commencement of the hearing. To the greatest extent practicable, please also provide a copy in electronic format according to the Electronic Format Guidelines that accompany these instructions.

Marilyn Moon

Profile

Marilyn Moon, Ph.D. is an Institute Fellow at AIR and director of its new Center on Aging. From 2003 through 2013, she directed the Health Program at the American Institutes for Research. Her current work focuses on the role of informing consumers, providers and policy makers about health care issues, issues in delivery system innovations, and approaches to Medicare reform. A nationally-known economist and expert on Medicare, aging, consumer health issues, and health care financing, Dr. Moon has also served as a senior fellow at the Urban Institute and as a public trustee for the Social Security and Medicare trust funds. From 2008 through 2012, she chaired the Maryland Health Care Commission, an independent group that advises state government and produces key reports and analysis for Maryland. She has written extensively on health policy, reform issues in Medicare health financing, and other social insurance issues. She has been an associate professor of economics at the University of Wisconsin, Milwaukee, a senior analyst at the Congressional Budget Office, and the founding director of the Public Policy Institute of the American Association of Retired Persons. Her work has focused on health care financing and public policy issues with a particular emphasis on Medicare cost of health care and its impact on access to care. She has served on a number of boards for non-profit organizations, including the Medicare Rights Center and the National Academy of Social Insurance. She is a member of the Institute of Medicine. Dr. Moon earned a Ph.D. in economics from the University of Wisconsin–Madison.

Education

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| Ph.D. | 1974, University of Wisconsin, College of Letters and Science, Economics |
| M.S. | 1972, University of Wisconsin, College of Letters and Science, Economics |
| B.A. | 1969, Colorado College, Economics, (summa cum laude, Phi Beta Kappa) |

Honors and Awards

- Recipient of Robert M. Ball award for excellence in social insurance, National Academy of Social Insurance, June 2014
- Chair, Maryland Health Care Commission, 2008-2012
- Member, Institute of Medicine, 2006–Present
- President, National Academy of Social Insurance, 2005–2006
- President of Board, Medicare Rights Center, 2005–2006
- Honorary Doctor of Laws Degree, The Colorado College, May 2002
- Program Co-chair, Gerontological Society of America Annual Conference, 2000
- Chair, Panel on Financing Medicare in the Future, National Academy of Social Insurance, 1998–2000
- Public Trustee, Medicare and Social Security Trust Funds, 1995–2000
- Board of Directors, Medicare Rights Center, 1996

Steering Committee, National Academy of an Aging Society, 1994–2000
Board of Directors, National Academy of Social Insurance, 1993–2001
Board of Directors, Association for Health Services Research, 1997–2000

Present Position

Institute Fellow and Director of Center on Aging, American Institutes for Research (AIR)

Conducts research and policy analysis on Medicare and other healthcare issues. Directs a new Center on Aging at AIR which is examining a broad range of issues facing current and future older Americans. This Board initiative produces short research and policy papers and is working to raise visibility for some lesser known areas of concern.

Prior Positions

Senior Vice President and Director, Health Program, AIR (2003-2012)

Responsible for ensuring client satisfaction with all aspects of the Health Program's research and development activities and products. Provided overall direction for the health program (160 staff members). Led strategic planning efforts. Directed resource allocation for over 50 projects totaling more than \$196 million. Corporate Monitor on two Centers for Medicaid & Medicare Services (CMS) IDIQ contracts.

Project Director, DHHS AHRQ Community Forum, AIR (2010–2012)

Directed an ARRA-funded initiative of AHRQ's Effective Health Care (EHC) Program to evaluate and develop approaches to expand the participation of the public and various stakeholder groups in improving the effectiveness of health care.

Chair, Maryland Health Care Commission (2008-2012)

Chaired the commission in the state of Maryland responsible for certificate of need for capital projects, producing information on quality and use of health services, advising on legislative initiatives involving health care, overseeing the small business health insurance program. While serving on the commission, led the review of applications for construction of a new hospital in Montgomery County.

Project Director, Medicare's Future, The Commonwealth Fund, AIR (2003–2006)

Senior Fellow, Urban Institute (1994-2003)

Responsible for raising funds for research and then conducting that research and managing younger researchers. Projects included a variety of topic areas including Medicare payment system analysis, distributional impacts of policy on Medicare beneficiaries, impacts of health insurance reform proposals, and developing simulation models of policy proposals.

Principal Investigator, Henry J. Kaiser Family Foundation, Issues Affecting Low-Income Medicare Beneficiaries, The Urban Institute (1999–2003)

Project Director, Research on Medicare’s Future, The Commonwealth Fund, The Urban Institute (1997–2003)

Columnist, The Patient’s Advocate, *The Washington Post* (1993–2000)

Wrote a column for the *Post* answering questions about health care reform (from 1993 to 1995) and then on health insurance coverage issues from 1995 to 2000.

Public Trustee, The Board of Trustees of the Medicare and Social Security Trust Funds (1995–2000)

As a public trustee, responsibilities included evaluating and establishing assumptions used in creating estimates of the health of the trust funds. Each year, the trustees provide a comprehensive report on the financial status of the trust funds.

Principal Investigator, Evaluation of the Medicare Catastrophic Coverage Act, Health Care Financing Commission, The Urban Institute (1990–1995)

Senior Research Associate, The Urban Institute (1983–1986; 1989–1994)

Consultant, The U.S. Bipartisan Commission on Comprehensive Health Care, The Pepper Commission (1989–1990)

Director, Public Policy Institute, American Association of Retired Persons (1986–1989)

As the founding director of the Public Policy Institute, responsibilities included hiring staff, developing relationships with other staff at AARP, developing a research agenda and participating in policy agenda setting for AARP.

Senior Analyst, Human Resources and Community Development Division, Congressional Budget Office (1981–1983)

Responsibilities included conducting research on entitlement issues, with a particular emphasis on Medicare.

Associate Professor of Economics, University of Wisconsin–Milwaukee (1980–1981)

Assistant Professor of Economics, University of Wisconsin–Milwaukee (1974–1980)

Research Associate, Institute for Research on Poverty, University of Wisconsin–Madison (1973–1974)

Employment History

2013–Present Institute Fellow and Director, Center on Aging, American Institutes for Research (AIR)

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- 2003-2013** Senior Vice President and Director, Health Program, American Institutes for Research
- 1994-2003** Senior Fellow, The Urban Institute
- 1995-2000** Public Trustee, Medicare and Social Security Trust Funds
- 1989-1994** Senior Research Associate, Health Policy Center, The Urban Institute
- 1989-1990** Consultant, the Pepper Commission
- 1986-1989** Director, Public Policy Institute, American Association of Retired Persons
- 1983-1986** Senior Research Associate, The Urban Institute
- 1981-1983** Senior Analyst, Human Resources and Community Development Division, The Congressional Budget Office
- 1980-1981** Associate Professor of Economics, University of Wisconsin–Milwaukee, and Director, Social Science Research Facility, University of Wisconsin–Milwaukee
- 1974-1980** Assistant Professor of Economics, University of Wisconsin–Milwaukee
- 1973-1974** Research Associate, Institute for Research on Poverty, University of Wisconsin–Madison

Publications

Peer-Reviewed Journals (Since 1990)

- Moon, M. (2012) “Medicare and the Affordable Care Act,” *Journal of Aging and Social Policy*, Vol 24, pp. 233-247.
- Lopert, R., and Moon, M. (2007). “Towards a Rational Value-Based Drug Benefit for Medicare,” *Health Affairs*, Vol. 26, November/December 2007, pp. 1666-1673.
- Davis, K., Cooper B., Moon, M., and Schoen, C. (2005). “Medicare Extra.” *Health Affairs Web Exclusive*, November.
- Moon, M. (2004). “Means Testing Medicare: A Skeptical View,” *Health Affairs Web Exclusive*, December.
- Moon, M. (2004). “The Future of Medicare as an Entitlement Program.” *Elder Law Journal*.
- Moon, M. (2003). “Modernizing Medicare’s Benefit Structure,” *Washington and Lee Law Review*, Vol. 60, No. 4, Fall, pp. 1207–1231.
- Boccuti C., and Moon, M. (2003). “Comparing Medicare and Private Insurers: Growth Rates in Spending over Three Decades,” *Health Affairs* Vol. 22, pp. 230–237.
- Moon, M. (2001). “Health Policy 2001: Medicare,” *New England Journal of Medicine*, Vol. 344, No. 12.

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- Moon, M. (2000). "Medicare Matters: Building on a Record of Accomplishments," *Health Care Financing Review* Vol. 22, No. 1, Fall, pp. 9–22.
- Moon, M., Segal, M., and Weiss, R. (2000/2001). "A Moving Target: Financing Medicare for the Future" *Inquiry*, Vol. 37, Winter, pp. 338–347.
- Moon, M. (2000). "Freedom to Pay or Freedom to Choose? Private Contracting and Medicare Beneficiaries," *Health Matrix: Journal of Law-Medicine* Vol. 10, Winter, pp. 21–34.
- Moon, M., (1999) "Will the Care Be There? Vulnerable Beneficiaries and Medicare Reform," *Health Affairs* 18, January/February, pp. 107–117.
- Moon, M., Brennan, N., and Segal, M. (1998) "Options for Aiding Low-Income Medicare Beneficiaries," *Inquiry* Vol. 35, No. 3, Fall, pp. 346–356.
- Moon, M., and Silberner, J. (1998). "What About Health Care for the Poor?" *The Washington Post*, June 29, p. A15.
- Feder, J., and Moon, M. (1998). "Is Managed Care for the Elderly A Threat or a Promise?" *Generations*, Vol. 22, no. 2, Summer, pp. 6–10.
- Moon, M. (1997). "No Medicare Gimmick," op-ed in *The Washington Post*, February 10, p. A19.
- Moon, M. (1996/97). "Facing Up to Medicare's Challenges," *Inquiry*, Vol. 44, No. 4 (Winter), pp. 304–307.
- Moon, M. (1996). "Fostering a Rational Debate on Social Insurance," *Journal of Aging and Social Policy* Vol. 8, No. 4, pp. 1–7.
- Moon, M. (1996). "What Medicare Has Meant to Older Americans," *Health Care Financing Review*, Vol. 18, No. 2 (Winter 1996), pp. 49–59.
- Marilyn Moon, M., and Davis, K. (1995). "Preserving and Strengthening Medicare," *Health Affairs*, Vol. 14 (Winter), pp. 31–46.
- Juster, F.T., and Moon, M. (1995). "Economic Status Variables and the HRS," *Journal of Human Resources*, Vol. 30, Supplement, pp. S138–S157.
- Dubay, L., Moon, M., and Norton, S. (1995). "Medicaid Expansions for Pregnant Women and Infants: Easing Hospitals' Uncompensated Care Burdens?" *Inquiry*, Vol. 32, pp. 332–344.
- Moon, M. (1995). "Medicare: An Appropriate Age-Related Program?" *Generations*, Vol. 19, pp. 50–53.

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- Moon, M. (1994). "Lessons from Medicare," *The Gerontologist*, Vol. 34, (October), pp. 606–611.
- Moon, M., Rubenstein, L., Marmor, T., Stone, R., and Harootyan, L. (1994). "Medicare: Challenges and Future Directions in a Changing Health Care Environment", *The Gerontologist*, Vol. 34, (October) pp. 620–627.
- Moon, M. (1994). "Medicare and Health Care Reform," *Journal of Aging and Social Policy*, Vol. 6, Nos. 1&2, pp. 27–42.
- Moon, M. (1994). "Health Care Policy: The Impact of Reform on Medicare," *Journal of Medical Practice Management*, Vol. 9, pp. 209-213 (March/April).
- Moon, M. (1993). "Seeing Health's Future: Predictions about the Outcome of Health Care Reform," *Home Care*, August.
- Moon, M. (1992). "What Should be the Role of States in Health Care Reform?" *Journal of the American Medical Association*, Vol. 268, (September 23/30) pp. 1588–1594.
- Moon, M. (1992). "Controlling the Growth in Health Care Costs," *Tennessee's Business*, Vol. 3, No. 2, pp. 15–20.
- Liu, K., Moon, M., Sulvetta, M. and Chawla, J. (1992). "International Infant Mortality Rankings: A Look Behind the Numbers," *Health Care Financing Review*, Vol. 13, (Summer 1992) pp. 105–118.
- Moon, M. (1991). "Medicare's Future: Increasing Pressure for Radical Reform," *The Internist*, March, pp. 14–16.
- Holahan, J., Moon, M., Welch, P., and Zuckerman, S. (1991). "An American Approach to Health System Reform," *Journal of the American Medical Association*, Vol. 265, pp. 2537–2540 (May 25,).
- Moon, M. (1990). "The Rise and Fall of the Medicare Catastrophic Coverage Act," *National Tax Journal*, Vol. 63, (September) pp. 371–381.
- Moon, M. (1990). "Consumer Issues and the Elderly," *Journal of Consumer Affairs*, Vol. 24, (Winter) pp. 235–244.
- Moon, M. (1990). "Public Policies: Are they Gender Neutral?" *Generations*, Vol. 14, (Summer) pp. 59–63.

Books and Book Chapters

- Moon, M. (forthcoming). "Organization and Financing of Healthcare." *Handbook of Aging and the Social Sciences*. Linda George, ed.

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- Moon, M. (2014). “Great Society Milestones: Medicare & Medicaid” in *Triumphs and Tragedies: Case Studies in Congressional Leadership*.
- Moon, M. (2011) “Organization and Financing of Health Care” in *Handbook of Aging and Social Sciences*, Robert Binstock and Linda George, eds. San Diego: Academic Press.
- Moon, M. (2010) “Entitlement Programs, Retirement Related Policies, and Governmental Politics,” in *Oxford Handbook on Work and Aging*, Jerry Hedge and Walter Borman, eds. New York: Oxford University Press.
- Moon, M. (2006). *Medicare: A policy primer*. Washington, DC: The Urban Institute Press.
- Clark, R., Burkhauser, R., Moon, M., Quinn, J., & Smeeding T. (2004). *The economics of an aging society*. Malden, MA: Blackwell Publishing.
- Moon, M. (2003). *A place at the table: Women’s needs and Medicare reform*. New York: The Century Foundation.
- Blumenthal, D., Moon, M., Warshawsky, M. and Boccuti, C., eds. (2003) *Long-Term Care and Medicare Policy: Can We Improve the Continuity of Care?* Washington, DC: National Academy of Social Insurance.
- Moon, M., ed. (2000). *Competition with Constraints: Challenges facing Medicare Reform*. Washington, DC: The Urban Institute Press.
- Moon, M. (1996). *Medicare Now and in the Future* (2nd ed.). Washington, DC: The Urban Institute Press.
- Moon, M. and Mulvey, J., (1995). *Entitlements and the Elderly: Protecting Promises, Recognizing Realities*, Washington, DC: The Urban Institute Press.
- Holahan, J., Moon, M., Welch, P. and Zuckerman, S., (1991). *Balancing Access, Costs and Politics: The American Context for Health System Reform*, Washington, DC: The Urban Institute Press.
- Moon, M. and Leader, S., eds., (1989). *Changing America’s Health Care System: Proposals for Legislative Action*. Glenview, IL: Scott, Foresman and Company.
- Moon, M., ed. (1984). *Economic Transfers in the United States*, Vol. 49, NBER Income and Wealth Conference Series. Chicago: University of Chicago Press.
- Moon, M. and Smolensky, E., eds. (1977). *Improving Measures of Economic Well-Being*. New York: Academic Press.
- Moon, M. (1977). *The Measurement of Economic Welfare: Its Application to the Aged*, New York: Academic Press.

Other Publications (Since 1990)

- Moon, M. (2013). "Obamacare as Political Theatre," Los Angeles Times, Op Ed, September 26.
- Moon, M (2009). "Lessons from Medicare for Health Care Reform." Center for American Progress. April.
- Moon, M. (2008). "The Consequences of Conservative Health Care Proposals on Our Medicare System." Center for American Progress Action Fund. October.
- Moon, M., Smith, B. and Gustafson , S. (2007). "Creating a Center for Evidence-Based Medicine," Medicare Payment Advisory Commission, July.
- Moon, M. (2007). Prospects for the Social Safety Net for Future Low Income Seniors," National Senior Citizens Law Center, November.
- Moon, M. (2006). "Meeting Health and Long-term Care Needs in Retirement." The Oxford Handbook of Pensions and Retirement Income. Ed. By Gordon L. Clark, Alicia H. Munnell, and J. Michael Orszag. Oxford University Press.
- Moon, M. (2006). "Organization and Financing of Healthcare." Handbook of Aging and the Social Sciences, 6th Edition. Ed. By Robert H. Binstock and Linda K. George. Academic Press.
- Angeles, J. and Moon, M. (2005). The Medicare Prescription Drug Law: Implications for Access to Care," *Virtual Mentor*, Ethics Journal of the American Medical Association, July, Volume 7, Number 7.
- Moon, M. (2004). *How beneficiaries fare under the new Medicare drug bill*. Commonwealth Fund Issue Brief.
- Boccuti, C., & Moon, M. (2003). *Private individual drug coverage in the current Medicare market*. Commonwealth Fund Issue Brief.
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- Moon, M., and Storeygard, M. (2002). "Stretching Federal Dollars: Policy Trade-Offs in Designing a Medicare Drug Benefit with Limited Resources," Commonwealth Fund Policy Brief.
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- Moon, M., and Storeygard, M. (2002). "Solvency or Affordability? Ways to Measure Medicare's Financial Health," Henry J. Kaiser Family Foundation.

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- Moon, M., and Boccuti, C. (2002). "Location, Location, Location: Geographic Spending Issues and Medicare Policy," Urban Institute Health Policy Briefs, No. 2.
- Johnson, R., Davidoff, A, and Moon, M. (2002). "Insuring the Near Elderly: The Potential Role for Medicare Buy-In," The Retirement Project Brief Series 13, The Urban Institute.
- Moon, M., and Storeygard, M. (2001). "One Third at Risk: The Special Circumstances of Medicare Beneficiaries with Health Problems," The Commonwealth Fund.
- Moon, M., and Storeygard, M. (2001). "Targeting Medicare Drug Benefits: Costs and Issues," Kaiser Family Foundation.
- Maxwell, S., Moon, M., and Storeygard, M. (2001). "Reforming Medicare's Benefit Package: Impact on Beneficiary Expenditures," The Commonwealth Fund.
- Maxwell, S., Moon, M., and Segal, M., (2001). "Growth in Medicare and Out-of-Pocket Spending: Impact on Vulnerable Beneficiaries," The Commonwealth Fund.
- Gluck, M., and Moon, M. (2000). "Financing Medicare's Future", National Academy of Social Insurance, September
- Moon, M. (1999–2000). "Building on Medicare's Strengths," *Issues in Science and Technology* Winter, pp. 65–71.
- Moon, M. (2000). "An Assessment of the President's Proposal to Modernize and Strengthen Medicare," The Commonwealth Fund, June.
- Kasten, J., Moon, M., and Segal, M. (2000). "What Do Medicare HMO Enrollees Spend Out-of-Pocket?" The Commonwealth Fund, July.
- Moon, M. (1994–2000). "Your Health Care Coverage, The Patients' Advocate," *The Washington Post*, an occasional column in the Health Section.
- Moon, M. (1999). *Can Competition Improve Medicare? A Look at Premium Support*, The Urban Institute Press, September.
- Moon, M. (1999). "Beneath the Averages: An Analysis of Medicare and Private Expenditures," The Henry J. Kaiser Family Foundation, September.
- Moon, M. (1999). "Budget Act Putting Squeeze on Medicare," *The Washington Post*, Health Section, July 20, pp. 26-27.
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- Moon, M. (1999). "Medicare, Medicaid, and the Health Care System," in *Life in an Older America*, edited by Robert Butler, Lawrence Grossman and Mia Oberlink. New York: The Century Foundation Press.
- Moon, M. (1999). "Restructuring Medicare: Impacts on Beneficiaries," UI Discussion paper (also published by Commonwealth Fund), January.
- Moon, M. (1999). "Growth in Medicare Spending: What Will Beneficiaries Pay?" UI Discussion paper (also published by Commonwealth Fund), January.
- Moon, M., Nichols, L., Norton, S., Ormond, B., Wallin, S., Hanson, J., and Pounder, L. (1998). *Health Policy for Low Income People in Colorado. Assessing New Federalism*. Washington: The Urban Institute Press.
- Lipson, D., Moon, M., Birnbaum, M., Norton, S., and Wallin, S. (1998). *Health Policy for Low Income People in Michigan. Assessing New Federalism*. Washington: The Urban Institute Press.
- Moon, M. (1998). "Why Press Medicare and Not the Insurers?" *Newsday*, October 15.
- Moon, M. (1997). "Does Medicare Make Sense as an Age-Related Program?" in *The Future of Age-Based Public Policy*, edited by Robert Hudson. Baltimore: Johns Hopkins University Press.
- Moon, M., and Gage, B. (1997). "Key Medicare Provisions in the Balanced Budget Act of 1997," *The Public Policy and Aging Report*, Fall, Vol. 8, No. 4.
- Moon, M. (1997). "Social Security: Critics Get It Wrong," *AARP Bulletin*, Vol. 38, No. 9 October, pp. 14.
- Moon, M., Gage, B., and Evans, A. (1997). "An Examination of Key Medicare Provisions in the Balanced Budget Act of 1997," *The Commonwealth Fund*, September 1997.
- Moon, M. (1997). "Short-Term Reforms and Medicare: An Overview," in *Policy Options for Reforming the Medicare Program: Papers from the Princeton Conference on Medicare Reform*, edited by S. Altman, U. Reinhardt, and D. Shactman, The Robert Wood Johnson Foundation, July.
- Moon, Marilyn, (1996). "Facing Up to Medicare's Future," op-ed piece in CNN-TIME on line service, July.

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- Moon, Marilyn, "Entitlements and the Elderly: A Major Story for the 90's and Beyond," Newsbackgrounder, A Publication of the Foundation for American Communications, published in Quill, (the Society of Professional Journalists).
- Moon, Marilyn, Gage, Barbara, Nichols, Len, Liu, Korbin, et al. (1997). "Medicare Savings: Options and Opportunities," The Urban Institute, June.
- Moon, Marilyn, (1997). Review of Providing Health Care Benefits in Retirement, in *Industrial & Labor Relations Review*, Vol. 50, No. 2, pp. 351–352, January.
- Nichols, Len, Moon, Marilyn, and Wall, Susan (1996). "Tax-Preferred Medical Savings Accounts and Catastrophic Health Insurance Plans: A Numerical Analysis of Winners and Losers," Urban Institute, April.
- Moon, Marilyn, (1996). "The Special Health Care Needs of the Elderly," in *Strategic Choices for a Changing Health Care System*, edited by Stuart Altman and Uwe Reinhardt. Chicago: Baxter.
- Moon, Marilyn, (1996). "Are Social Security Benefits Too High or Too Low?" in *Social Security in the 21st Century*, edited by James Schulz and Eric Kingson. New York: Oxford University Press.
- Moon, Marilyn (1996). "Means-Testing Medicare," in *Controversies in Aging*, edited by Lenard Kaye. Allyn and Bacon.
- Moon, Marilyn, Kuntz, Crystal and Pounder, Laurie (1996). Protecting Low Income Medicare Beneficiaries," The Commonwealth Fund, November.
- Moon, Marilyn and Kuntz, Crystal (1996). "Raising Revenue with Medicare's Part B Premium," The Commonwealth Fund, November.
- Moon, Marilyn (1996). "Restructuring Medicare Cost Sharing," The Commonwealth Fund, November.
- Moon, Marilyn (1996) "Medical Savings Accounts: A Policy Analysis" (with Len Nichols and Susan Wall), Urban Institute Discussion Paper, March.
- Moon, Marilyn (1996) "Understanding the Effects of Major Medicare Savings," Commonwealth Fund, March.
- Moon, Marilyn and Mulvey, Janemarie (1996). "Incorporating Health and Asset Adjustments into Measures of Economic Well-Being," Urban Institute Discussion Paper, January.
- Moon, Marilyn, (1995). "An Analysis of Alternative 'SWAP' Proposals and Their Potential Implications for States" (with Linda Blumberg), prepared under Health Care Financing Administration Contract No. 500-92-0024 DO#6. Washington, DC: The Urban Institute, October.

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- Moon, Marilyn and Zuckerman, Stephen (1995). "Are Private Insurers Really Controlling Spending Better Than Medicare?" Henry J. Kaiser Family Foundation, July.
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- Moon, Marilyn and Kenney, Genevieve (1995). "Medicare Subacute Care Services and Enrollee Characteristics," prepared under Health Care Financing Administration Contract No. 500-89-0064. Washington, DC: The Urban Institute, April.
- Moon, Marilyn (1995). "Projecting Health Care Costs for Older Americans," prepared for the Committee on National Statistics' Panel on Retirement Income Modeling. Washington DC, August.
- Moon, Marilyn and Liska, David (1995). "Options for Reformulating the Federal Medical Assistance Percentage Formula," Urban Institute Discussion Paper, July.
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- Moon, Marilyn (1995). "Medicare, Its Trust Fund, and Deficit Reduction," The Urban Institute Policy and Research Report, Vol. 25, No. 1, p. 32.
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- "Meeting Medicare's Future Needs, Cost and Payment of Medicare Part D" (September 2005) Testimony before the U.S. Senate Subcommittee on Federal Financial Management, Government Information, and International Security, U.S. Senate Committee on Homeland Security and Governmental Affairs.
- "Medicare and Private Plans: Separating Fact from Fiction" Testimony for the Senate Committee on Aging, May 6, 2003.

“The Viability of the Medicare Program” Testimony for the Joint Economic Committee, April 10, 2003.

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“Medicare, Modernization and FEHBP” Testimony before the Subcommittee on Health, Committee on Energy and Commerce, U.S. House of Representatives, March 20, 2002.

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“Beneficiary Issues and Medicare+Choice,” Testimony before the Subcommittee on Health, Committee on Ways and Means, U.S. House of Representatives, May 1, 2001.

“Medicare in the 2002 Budget,” testimony before the Budget Committee, U.S. House of Representatives, March 7, 2001.

“Prescription Drugs as a Starting Point for Medicare Reform,” testimony before the Budget Committee, U.S. Senate, February 15, 2001.

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- “Growth in Medicare Spending,” Testimony before the Health Subcommittee, Committee on Commerce, U.S. House of Representatives 104th Congress 1st Session June 28, 1995.
- “The Role of Private Long-Term Care Insurance,” Testimony before the Senate Aging Committee, May 11, 1995.
- “The Growth of Health Entitlements and the Federal Budget,” Testimony before Subcommittee on Health and Environment, Committee on Commerce, March 28, 1995.
- Testimony to the 1994-95 Advisory Council on Social Security (with Janemarie Mulvey), Washington, March 8, 1995.
- “Health Care Spending and the Federal Budget,” Testimony presented to Senate Budget Committee, February 1, 1995.
- “Taxation of Social Security Benefits,” Hearing before Ways and Means Committee, January 19, 1995.
- “The Importance of a National Health Care Data Base,” Testimony at hearing sponsored by the Departments of Health and Human Services and Education, December 8, 1994.
- “The Impact of Alternative Investments for the Social Security Trust Fund,” Testimony before the Subcommittee on Social Security, Committee on Ways and Means, U.S. House of Representatives, October 4, 1994.
- “The Impact of H.R. 3222,” Testimony presented before the Committee on Education and Labor, U.S. House of Representatives, March 3, 1994.
- “Health Care Reform Tradeoffs,” Testimony presented before the Committee on Education and Labor, U.S. House of Representatives, February 7, 1994.
- “Health Care Burdens on American Families,” Testimony presented before the Joint Economic Committee, U.S. Congress, September 15, 1993.
- “An Overview of Long-Term Care,” Testimony to the Senate Committee on Finance, May 13, 1992.
- “Expanding Medicare Coverage to the Near Elderly,” Testimony to the Health Subcommittee, Committee on Ways and Means, March 19, 1991.
- “The Adequacy of Retirement Programs in the U.S.” Testimony before the House Budget Committee, U.S. House of Representatives, July 10, 1991.

“Beneficiary Issues in Medicare,” Testimony presented to the Subcommittee on Medicare and Long-Term Care of the Committee on Finance, United States Senate, March 3, 1989.

“Physician Relative Value Scales,” Testimony presented to the Joint Economic Committee, United States Congress, June 14, 1988.

“Home Health Care Quality,” Testimony before the House Select Committee on Aging, July, 1986.

“The Role of Caregiving in Home and Community Based Care,” Forum on Family Caregiving and Respite Care, Select Committee on Aging, U.S. House of Representatives, January 24, 1986.

“Changes in the Distribution of Income and Poverty of Black Families 1980-84,” Testimony before the Select Committee on Hunger, U.S. House of Representatives, September 26, 1985.

“Medicare: Future Problems and Options for Change,” Testimony presented before the Special Committee on Aging, U.S. Senate, April 20, 1984. Printed in Medicare: Present Problems-Future Options, U.S. Government Printing Office, 1984.

“Changes in the Distribution of Income and Their Causes, 1980-84,” Testimony presented before the Subcommittee on Oversight and the Subcommittee on Public Assistance and Unemployment Compensation of the Committee on Ways and Means, September 20, 1983.

Selected Professional Presentations

“Reaffirming the Role of Social Insurance,” Keynote Lecture, Robert M. Ball Award, National Academy of Social Insurance, June 3, 2014.

“Understanding the Impact of the Affordable Care Act,” Sarasota Florida Adult Learning Program, February 2014.

“Issues Facing Medicare Beneficiaries,” Center for Medicare Adequacy Annual Forum, Washington, March 2014.

“Dual Eligibles Demonstrations: Cautionary Concerns,” Leading Age Conference, Sacramento, CA, February 2013.

“Principles for Assessing Reform Options,” National Academy of Social Insurance Annual Conference on Medicare and Social Security in a Time of Budget Austerity,” Washington, DC, January 2013.

“Protecting Beneficiaries,” Kaiser Family Foundation Forum on Options for Medicare Reform, Washington, DC, January 2013.

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- “Medicare and Budget Issues,” briefing for House of Representatives Budget Committee members, Washington, DC, January 2013.
- “Getting the Health Care System We Deserve,” Founders Day Lecture, Marietta College, Marietta, OH, February 2011.
- “Understanding the Furor over Medicare Death Panels,” CDC Conference on Social Marketing, Atlanta, GA, August 2011.
- “The ACA and Medicare,” Annual Conference of the National Association of Retired Federal Employees, Crystal City, VA, March 2011.
- “Translating Research into Practice,” American Institutes for Research forum, Washington, DC, June 2009.
- “Challenges for Medicare’s Future,” presentation at the Signature Foundation annual meeting, St. Louis, November 3, 2005.
- “Medicare: Balancing Cost, Access and Quality,” Presented to Medical School of the University of North Carolina, September 9, 2005.
- “State Issues Surrounding the New Prescription Drug Benefit,” presentation at conference sponsored by State Solutions, Washington, May 2005.
- “Remaining Challenges facing Medicare after the Drug Benefit,” presentation at the LBJ School, University of Texas, Austin, April 22, 2004.
- “The Future of Medicare as an Entitlement Program,” Elder Law Lecture, University of Illinois, March 1, 2004.
- “The Financial Future of Medicare,” panel participant, Health Action 2004, Families USA conference, January 22, 2004
- “The New Prescription Drug Benefit,” Congressional Staff Retreat, January 9, 2004.
- “Medicare Matters: Reform Issues” Harvard Medical School, Boston, April 14, 2003.
- “Medicare vs. Private Sector Growth Rates,” Alliance for Health Reform Briefing, Capitol Hill, March 17, 2003.
- “Evidence-Based Policy Lessons for a Medicare Drug Benefit,” Harvard/Commonwealth Fund Health Care Retreat for Members of Congress, Miami, January 17, 2003.
- “The Aging of the Baby Boom and Entitlements,” Congressional Research Service retreat for new members of the House of Representatives, Williamsburg, VA, January 12, 2003.
- “Medicare Drug Benefit Issues,” Alliance for Health Reform Retreat for Capitol Hill Staff, January 10, 2003.

“Restructuring Medicare’s Benefit Package,” Gerontological Society Meetings, Boston, November 2002.

“Complications for Medicare Reform from Geographic Variations,” GAO Medicare Meeting, September 12, 2002.

“Our Changing Health Care System,” Conference on public issues for pension managers, Rye, N.Y., October 18, 2002.

“Medicare Issues from a Researcher’s Perspective,” panel discussion at Robert Wood Johnson Fellows retreat, Washington, October 13, 2002.

“Current Legislative Issues Facing Medicare,” National Association of Area Agencies on Aging,” Washington, D.C., April 29, 2002.

“Medicare Financing Issues,” Panel for Association of Budget and Program Analysts, Washington, D.C. May 2, 2002.

“How Much is Enough for A Drug Benefit?” Alliance for Health Reform briefing, Washington, D.C. May 16, 2002.

“Medicare’s Future,” National Economists Club and Committee on Status of Women in the Economics Profession joint meeting, June 13, 2002.

“Assessing New Realities in Medicare,” presentation at Congressional Staff Retreat in Baltimore, January 11, 2002.

“Dollars and Drugs,” presentation at Commonwealth Fund Roundtable on Medicare, February 20, 2002.

“Budget Issues and the Broader Costs of Prescription Drugs,” presentation at Commonwealth Fund Roundtable on Medicare, April 3, 2002.

“Out-of-Pocket Issues and Medicare,” seminar at Mt. Sinai Hospital, NYC, April 9, 2002.

“The Future of Medicare,” Health Economics class presentation, The Wharton School, University of Pennsylvania, December 4, 2001.

“Health and Income Security,” Conference on the Future of Aging, AARP and Georgetown University, December 11, 2001.

Prospects for Medicare Reform and Other Health Care Legislation,” RWJ Executive Nurse Fellowship Annual Meeting, San Francisco, October 5, 2001.

“Prescription Drug Issues: Where We Stand,” Capitol Hill Staff briefing organized by Alliance for Health Reform, July 13, 2001.

Social Security, Medicare and Aging Issues,” National Press Foundation seminar, June 2001.

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- “Policy Ramifications of a New Administration,” Healthcare Financial Management Association, Chicago, June 2001.
- “The Future of Medicare,” Access and Values Meeting, Alexandria, VA, March 12, 2001.
- “Medicare and Private Supplemental Insurance,” Mellon Foundation project on Retirement, New York, February 25, 2001.
- “Options for Reforming Social Security,” National Council of Women’s Organizations conference, February 8, 2001.
- “Medicare Restructuring Issues,” First Annual National Health Policy Conference, Academy for Health Services Research and Health Policy, February 1, 2001.
- “Medicare Issues: Broad-based Reform” Congressional Staff Briefing, Alliance for Health Reform, Baltimore, January 12, 2001.
- “Medicare Financing Issues,” Annual Conference of National Academy of Social Insurance, Washington, January 24, 2001.
- “Medicare Beneficiary Costs: A Crucial Reform Challenge,” First Tuesday, January 2, 2001.
- “Future of Medicare,” Gerontological Society Conference, Washington, November 19, 2000.
- “Health Issues in Living Longer and Living Better” congressional briefing in connection with Gerontological Conference, November 21, 2000.
- “Medicare + Choice Issues” Capitol Hill Staff briefing organized by Senator Jay Rockefeller and Congressman Pete Stark, Washington, July 26, 2000.
- “What’s on the Political Horizon for Medicare?” Conference on the Future of Medicare, Coalition of Wisconsin Aging Groups, Milwaukee, June 20, 2000.
- “Can Medicare Survive its Saviors?” National Academy of Elder Law Attorneys Annual Symposium, Philadelphia, May 4, 2000.
- “Future Challenges Facing Medicare” Health Insurance Association of America, Task Force Meeting, April 27, 2000.
- “The Future of Medicare: An Insiders Look at the New Trustees Report,” Alliance for Health Reform Briefing, April 10, 2000.
- “Proposals to Reform Medicare, Medicaid and Health Care,” National Association of Area Agencies on Aging Annual Legislative Briefing, March 13, 2000.
- “Medicare 2000: Price Tag on Reform,” American Academy of Actuaries Capitol Hill Briefing, February 10, 2000.

“Social Security Reform Issues,” AARP Legislative Council, February 3, 2000.

“Medicare and the Future,” Annual meeting of the Georgia Chapter of National Health Care Management Association, Atlanta, February 11, 2000.

“Medicare? Facing Major Choices” Health Policy 2000: Is there Room for Bipartisan Action?” A Seminar for Senior Congressional Staff, January 13-14, 2000.

“An Assessment of the President’s Proposal on Medicare,” briefing for Congressional staff sponsored by Alliance for Health Reform, September 13, 1999.

“Issues Facing Medicare: The Big Picture,” presentation to staff of regional offices of Inspector General, DHHS, Phoenix, Arizona, August 25, 1999.

“Can the Private Sector Save Medicare?” presentation to the School of Allied Health, University of Alabama-Birmingham, June 17, 1999.

“The Future of Medicare,” National Economists Club, Washington, DC, March 25, 1999.

“Understanding the Options for Medicare,” presentation to the National Senior Citizens Law Center, Washington, February 16, 1999.

“Premium Support Models for Medicare” Commonwealth Fund briefing, Washington, February 11, 1999.

“Medicare’s Future,” Health Retreat for Congressional Members, January 22, 1999, Miami, sponsored by Harvard University.

“Medicare Reform Issues,” meeting in Chicago Illinois sponsored by Older Women’s League, January 14, 1999.

“An Examination of the Long Term Issues and Options Facing Medicare,” Congressional staff retreat, Annapolis, January 15, 1999.

Panelist on the Nature of Social Security’s Problems, White House Conference on Social Security, Washington, DC, December 8, 1998.

“FEHBP as a Model for Medicare?” Alliance for Health Reform briefing, Washington, November 30, 1998.

“Medicare Changes: Implications for the Delivery of Care,” Gerontological Society of America annual meeting, Philadelphia, November 21, 1998.

“Medicare in the New Millennium,” Gerontological Society of America annual meeting, Philadelphia, November 21, 1998.

“Impact of the Balanced Budget Act on Medicare,” American Public Health Association annual meeting, Washington, DC, November 17, 1998.

“Medicare in a Changing World: Privatization, Individualization or Social Insurance?” Claude Pepper Memorial Lecture, Pepper Institute on Aging and Public Policy, Florida State University, Tallahassee, Florida, November 5, 1998.

“Challenges and Opportunities in the Medicare Program,” National Association of Public Hospitals annual meeting, Washington, DC, November 13, 1998.

Briefing for Senate Democrats on “How to Understand the Challenges Facing Social Security,” October 1998.

“Are Entitlements an Endangered Species?” Economic Roundtable of the Ohio Valley, Marietta, OH, September 8, 1998.

“Issues Facing Reform of Social Security,” Presidential Roundtables on Social Security, Kansas City, April 7, 1998 and Providence, RI, July 1, 1998.

“The Future of Medicare,” University of Minnesota, Center on Aging, May 17, 1998.

“The Future of Medicare,” Grand Rounds, University of Nebraska Medical Center, May 5, 1998.

“The Importance of Medicare and Medicaid on Issues Facing Social Security,” Secure Retirement Coalition, Capitol Hill, Washington, DC, January 14, 1998.

“The Long-Term Issues Facing Medicare,” Alliance for Health Reform, Capitol Hill Briefing, October 27, 1997.

“The Impacts of Health Care Legislation,” Idaho Hospital Association, October 6, 1997.

“Will Today’s Health Care Exist For Tomorrow’s Retirees?” presentation for MarketWatch: A Briefing Series for Journalists on Changes in the Health Care System, sponsored by the Henry J. Kaiser Family Foundation and the National Press Foundation, September 30, 1997.

Roundtable discussion on Social Security, American Political Science Association Meeting, August 28, 1997.

Roundtable discussion on Medicare, American Political Science Association Meeting, August 29, 1997.

“Medicare Changes in the Budget Bills,” Alliance for Health Reform, Capitol Hill Briefing, July 9, 1997.

“Designing Medicare’s Future: Managed Care Policy,” presentation at the 1997 ICA Project Directors Conference: Insurance Counseling and Assistance Programs Meeting the Challenges in Health Care Today and Tomorrow, June 17, 1997.

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- “Dual Eligibility for Medicaid and Medicare: Options for Creating a Continuum of Care,” a discussion sponsored by the National Health Policy Forum of the George Washington University. May 6, 1997.
- “The Elderly and Intergenerational Equity Issues,” Petticrew Faith in Action Seminar, Indianapolis, April 29, 1997.
- “Entitlements and the Elderly: Incremental or Structural Changes?” Brookdale Foundation Annual Retreat, Teaneck, NJ, April 25, 1997.
- “Short Term Reforms and Medicare: An Overview,” paper presented at Robert Wood Johnson Conference on Medicare, Princeton University, February 28, 1997.
- “Prospects for Medicare in the Upcoming Budget Debate,” Alliance for Health Reform meeting, Capitol Hill, February 10, 1997.
- “Medicare’s Future, What the Data Tell Us,” Grand Rounds, School of Public Health, Johns Hopkins University, February 27, 1997.
- “What Should Consumers Want from Medicare Managed Care?” address to conference on managed care and Medicare, Seattle, WA, October 30, 1996.
- “The Privatization of Social Security,” presentation at National Taxpayers Union meeting, June 21, 1996.
- “Medicare Trust Fund Issues,” American Enterprise Institute, June 13, 1996.
- “The Trust Fund Reports and Medicare,” Alliance for Health Reform Briefing, Capitol Hill, June 7, 1996.
- “The Future of Medicare,” address at conference in Pittsburgh, PA, June 17, 1996.
- “The Importance of Medicare for the Elderly,” presentation at the 30th Anniversary of Medicare Celebration sponsored by Health Care Financing Administration, May 6, 1996.
- “The Prospects for Rational Medicare Reform,” Woodrow Wilson School, Princeton University seminar series, March 27, 1996.
- “The Future of Medicare,” Michigan Health Policy Seminar, Lansing, MI, February 5, 1996
- “The Future of Medicare,” seminar, General Accounting Office, October 17, 1995.
- “The Status of Medicare and Medicaid Changes,” Alliance for Health Reform Briefings on Capitol Hill, September 22 and October 11, 1995.
- “The Future of Medicare,” lecture, the Jerome Levy Institute, Bard College, September 14, 1995.
- “Medicare and Medicaid,” the Diane Rehm show on PBS (with Gail Wilensky), August 9, 1995.

“Prospects for Changes in Medicare and Medicaid,” Alliance for Health Reform Briefing on Capitol Hill, June 5, 1995.

“Medicare and the Private Insurance Market,” seminar at Health Insurance Association of America, June 27, 1995.

“The Rate of Growth of Spending in Medicare and the Private Sector,” Alliance for Health Reform briefing, Capitol Hill, August 7, 1995.

“Entitlements,” meeting of the Freedom Forum (briefings to a small group of media reporters), Rosslyn, VA, March 15, 1995.

“Lessons from Medicare’s History,” Hill Briefing sponsored by Alliance for Health Reform, Washington, DC, February 3, 1995.

“The Future of Long-Term Care,” Miniconference for the White House Conference on Aging, sponsored by Partners in Caregiving, Washington, DC, February 17, 1995.

“Prospects for Federal Health Legislation,” Radio and Television News Directors Foundation, roundtable, Washington, DC, February 22, 1995.

“Medicaid,” meeting of state commissioners of social welfare, sponsored by American Public Welfare Assn., Washington, DC, February 25, 1995.

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- Moon, Marilyn and Sawhill, Isabel (1984) "Family Incomes" in *The Reagan Record*, John Palmer and Isabel Sawhill, eds., Cambridge, Massachusetts, Ballinger Publishing Company.
- Michel, Richard, Levy, Frank, Moon, Marilyn, and Sawhill, Isabel (1984) "Are We Better Off in 1984?" *Challenge*, Vol. 27, (September/October) pp. 10–17.
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- Moon, Marilyn (1983) "Poverty Among Elderly Women and Minorities," Urban Institute Changing Domestic Priorities Discussion Paper, February.
- Moon, Marilyn (1983), Book Review of *A Challenge to Social Security: The Changing Roles of Men and Women in American Society* in *Journal of Gerontology*, Vol. 38 (September), pp. 629–630.
- Moon, Marilyn (1983), "Scaling Medicare Benefits to Income," Special Study, Congressional Budget Office, May.
- Moon, Marilyn (1983), "Private Capacity to Finance Long-Term Care," Urban Institute Working Paper (revised), March.
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- Moon, Marilyn (1981), "Measuring Economic Status: Current Contributions and Future Directions", *Economic Perspectives*, Vol. 2, pp. 131–153.
- Moon, Marilyn and Smeeding, Timothy (1981) "Medical Care Transfers, Poverty and the Aged," *Journal of Health Politics, Policy and Law*, Vol. 6, (Spring), pp. 29–39.
- Moon, Marilyn (1981), "Intergenerational Transfers and Public Policy," Final Report for National Institute on Aging, Grant No. AG1323-02, Spring.
- Moon, Marilyn (1980), "Provisions of Many Public Programs Discourage Family Support of the Elderly," *Generations*, Vol. 5 (October), pp. 14-15, 39.
- Smeeding, Timothy and Moon, Marilyn (1980), "Valuing Government Expenditures: The Case of Medical Care Transfers and Poverty," *Review of Income and Wealth*, Vol. 26 (December), pp. 305–323.
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- Moon, Marilyn (1980), "Public Policy and Private Transfers to the Elderly," *Social Welfare Forum*, 1979, New York, Columbia University Press.
- Moon, Marilyn (1980) "Incorporating Occupational Attainment in Studies of Male-Female Earnings Differentials," (with Randall Brown and Barbara Zoloth), *Journal of Human Resources*, Vol. 15 (Winter), pp. 1–28.
- Moon, Marilyn (1980), "Supplemental Security Income, Asset Tests and Equity," *Policy Analysis*, Vol. 6 (Winter), pp. 1–20.
- Moon, Marilyn (1980), "Taxation and Treatment of Income: Comments on Social Welfare Programs," in *Unlocking Home Equity for the Elderly*, ed. by Ken Scholen and Yung Ping Chen; Ballinger.
- Moon, Marilyn (1979), "The Incidence of Poverty Among the Aged," *Journal of Human Resources*, Vol. 14 (Spring) pp. 211–221.
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Moon, Marilyn (1975), Book review of *The Urban Elderly Poor* in *Journal of Human Resources*, Vol. 10 (Summer), pp. 409–410.