

Legislative & Policy Engagement Guidelines

Panelist Bio **Tom Lussier, President, The Lussier Group**

Tom Lussier is President of The Lussier Group, governmental affairs consulting firm based in Alexandria, Virginia. The Lussier Group offers a full range of government-related consulting services and legislative representation primarily focused on public employee pension and health benefits. In addition, the firm is actively engaged in the management of national coalitions in support of specific Federal advocacy objectives, including the Coalition to Preserve Retirement Security (CPRS) and the Public Sector HealthCare Roundtable.

Tom previously served as Executive Director and CEO of the Massachusetts Teachers' Retirement System (MTRS). For nearly 19 years, he was responsible for the administration of retirement benefits for approximately 110,000 active and retired teachers and school administrators of the Commonwealth of Massachusetts.

Tom has served as President of the National Council on Teacher Retirement, Chairman of CPRS, and President of the National Preretirement Education Association. He has been an instructor with the International Foundation of Employee Benefit Plans' Certificate of Achievement in Public Plan Policy in Employee Pensions and is a former member of the Foundation's Public Employee Committee.

Prior to the MTRS, he served as the First Deputy Commissioner of the Massachusetts Division of Public Employee Retirement Administration and was elected to four terms in the Massachusetts House of Representatives. He has the distinction of being the youngest person elected to the Massachusetts House of Representatives; he was first elected in 1977 at the age of nineteen. In 1976, Tom was elected to the City Council in Pittsfield, Massachusetts.

Tom is a former member of the Massachusetts Retirement Law Commission, and a former Trustee of the Methuen Contributory Retirement System in Methuen, Massachusetts.

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Panelist Bio **Anthony Roda, Principal, Williams and Jensen**

Tony Roda is a partner in the Washington, DC, law and lobbying firm Williams & Jensen, PLLC. He has been actively involved in public policy, law and politics his entire professional career. He began his professional service in government as a research assistant in the British House of Commons and then worked for 10 years on Capitol Hill as a legislative staff person in the U.S. Congress, where he handled federal tax policy issues on a day-to-day basis.

Since joining Williams & Jensen in 1992, Tony has managed projects that have resulted in amendments to federal statutory law, including the Internal Revenue Code, and specific regulatory relief. Tony has helped numerous clients on projects involving federal tax legislation and regulation, including work in the state and local governmental pension area on behalf of the National Conference on Public Employee Retirement Systems and individual plans in California, Ohio, Tennessee, and Texas. He is a member of the National Association of Public Pension Attorneys and frequent speaker at national conferences on topics relating to federal legislative and regulatory matters affecting public pension plans. He has also authored numerous articles on matters affecting state and local governmental plans.

Tony earned his Bachelor of Arts degree in Government & Politics from the University of Maryland, Juris Doctor from Catholic University Law School, and Masters in Tax Law from the Georgetown University Law Center. He is a member of the District of Columbia, Virginia and U.S. Supreme Court bars.

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Panelist Bio **Yvette Fontenot, Partner, Avenue Solutions**

Yvette Fontenot is a Partner at Avenue Solutions, a health care policy, legislative strategy and communications consulting firm. Yvette develops and implements targeted and comprehensive policy on behalf of health care clients including employers, insurers and providers. She develops and pursues advocacy and communications strategies to increase the chances of favorable legislative consideration within the Congress or administrative action in the Executive Branch and to improve reception toward particular favored policies. Prior to joining Avenue Solutions, Yvette was the Deputy Director of the Office of Health Reform at the Department of Health and Human Services where she developed policy and coordinated and cleared all matters related to the Affordable Care Act and provided outreach to Congress and other stakeholders with interests in health care reform.

Yvette was a Senior Advisor in the White House Office of Health Reform. At the White House, Yvette was responsible for coordinating the Administration's work on implementation of the Affordable Care Act. She also briefed and advised senior White House officials about aspects of the legislation and implementation efforts. Yvette served as Professional Staff with the Senate Finance Committee where she had principle responsibility for provisions of the Affordable Care Act such as individual and employer responsibility requirements, tax credits for the purchase of health coverage, health insurance exchanges, health insurance rating reform, and consumer protection proposals. She also advised Chairman Baucus and Committee members on health insurance reform legislation before the Committee and Congress.

Yvette has also served as Professional Staff for the House Committee on Energy and Commerce in the U.S. House of Representatives for Democratic Congressman John D. Dingell; as Senior Legislative Advisor for Health Policy for Senator John D. Rockefeller; and as an analyst for the Office of Management and Budget. In these capacities, Yvette developed, analyzed, and estimated the budgetary and programmatic impacts of and pursued legislation affecting Medicare, Medicaid, and the Children's Health Insurance Program with a focus on physician, prescription drug and hospital reimbursement. Yvette received her master's degree from the University of Chicago (June 1997) and her bachelor's degree from Duke University (May 1994).

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Panelist Bio **Chris Jennings, Partner, Jennings Policy Strategies**

Chris Jennings has over three decades of health policy in the White House, the Congress and the private sector. He is currently President of Jennings Policy Strategies (JPS), a nationally respected health care consulting firm committed to assisting foundations, purchasers, health systems and other aligned stakeholders develop policies to ensure higher quality, more affordable and sustainable health care.

JPS, Inc. works to develop non-partisan administrative, legislative, and private sector policies to ensure better stewardship of and a greater return on investment on the nation's \$3 trillion investment in health care. Recognizing his pragmatic nature and experience, the Bipartisan Policy Center sought Chris to serve as a senior advisor on a number of health reform projects, including reports and recommendations on access, delivery reforms, cost containment, and long-term care for the Robert Wood Johnson Foundation, the Peterson Center and the SCAN Foundation.

In January 2014, Chris departed from his second tour of duty in the White House where he served as Senior Advisor to the President for Health Policy and Coordinator of Health Reform. He served in a similar capacity in the Clinton White House for nearly eight years. From his positions in the executive branch, Chris has helped implement access and delivery reform provisions of the Affordable Care Act. He held leadership roles in the development, passage, and implementation of bipartisan health reforms, such as the Children's Health Insurance Program, the Health Insurance Portability and Accountability Act, the Prescription Drug User Fee Act of 1997, and major Medicare reforms in the Balanced Budget Act of 1997.

In his decade of service in the U.S. Senate, he served as the Deputy Director of the Special Committee on Aging for three Senators (including his home state Senator, John Glenn) and led major reform efforts in the areas of long-term care, prescription drug coverage/cost containment, and rural health care. In this capacity, he also served in a major role for the U.S. Bipartisan Commission on Health Care (also known as the "Pepper Commission").

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Panelist Bio **Daniel Crowley, Partner, K&L Gates**

Dan Crowley represents financial services providers on a broad range of policy issues including accounting & financial reporting, broker-dealer & securities trading, commodities & futures, corporate governance, depository institutions, derivatives & securitization, hedge funds, insurance, investment management, mortgage banking & consumer finance, and retirement security & pensions. He leads the firm's global financial services policy practice and facilitates coordination among these practice areas on behalf of the firm's policy clients.

Prior to joining K&L Gates as partner in September 2008, for five years Dan was chief government affairs officer at the Investment Company Institute, the national association of the mutual fund industry. Previously, Dan was vice president and managing director, Office of Government Relations, the Nasdaq Stock Market, Inc. (NASDAQ). He joined NASDAQ after managing government relations during the spin-off of NASDAQ from its former parent, the National Association of Securities Dealers, Inc. (NASD, n/k/a FINRA). Before joining NASD as vice president, Governmental Affairs, Dan served for eight years in the U.S. House of Representatives in increasingly senior staff positions, including: general counsel, Office of Speaker Newt Gingrich; general counsel, Committee on House Oversight (Bill Thomas, *Chairman*); and minority counsel, Committee on House Administration (Bill Thomas, *Ranking Member*).

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Panelist Bio **Karishma Page, Partner, K&L Gates**

Karishma Shah Page is a member of K&L Gates' Public Policy and Law Practice in Washington, D.C. Karishma concentrates her practice on federal legislative and regulatory policy, focusing on tax, financial services, retirement, health care, and employee benefits issues. Karishma has extensive experience working on a variety of tax legislation, the Dodd-Frank Wall Street Reform and Consumer Protection Act, retirement legislation, the Affordable Care Act, and related rulemaking and regulatory activity.

Karishma develops and implements a variety of advocacy strategies to advance client objectives, both from a Congressional and administrative perspective. In particular, she leads complex, multi-faceted policy campaigns incorporating lobbying, coalitions and third-party advocates, grassroots/grasstops strategies, and traditional and new media. Additionally, she has experience building, managing, and working with coalitions.

Karishma counsels clients with respect to the key legislative and regulatory developments that impact their operations. Karishma's clients include Fortune 500 companies, trade and member associations, and tax-exempt entities. She also advises clients on the intersection between social responsibility initiatives and the policy debate.

Karishma works closely on issues involving the House Ways and Means Committee, Senate Finance Committee, House Financial Services Committee, Senate Banking Committee, House Education and the Workforce Committee, Senate Health, Education, Labor, and Pensions Committee, and Senate Aging Committee, as well as the Department of the Treasury, Internal Revenue Service, Department of Labor, and financial regulators.

Prior to joining the firm, Karishma worked as a lobbyist and policy analyst for a government relations firm based in Michigan. She has also served as a legal clerk for the House Committee on Foreign Affairs, the Office of the United States Trade Representative in the Executive Office of the President, and the United States Agency for International Development, and an intern for the Tax-Exempt Organization Division of the Internal Revenue Service.

Karishma was a summer associate with the firm in 2007.
